

Business Retention and Expansion: Report on Columbia Valley Businesses

PREPARED BY THE COLUMBIA BASIN RURAL DEVELOPMENT INSTITUTE (RDI) FOR THE
REGIONAL DISTRICT OF EAST KOOTENAY

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EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 69 businesses in the Columbia Valley communities – Village of Radium Hot Springs, District of Invermere, Village of Canal Flats, RDEK Electoral Area F & G; Shuswap Indian Band; and Akisqnuq First Nation. 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.

Key Research Findings

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Accommodation and Food Service' and 'Retail and Wholesale Trade' under the North American Industry Classification system.
	The workforce and the location were the two most frequently cited reasons given for success in the Columbia Valley.
	Most companies surveyed have been in business for over 20 years.
	Over half of the companies are 'growing'.
Local Workforce	69 respondents reported a total of 1,768 employees.
	The majority of employees are full-time.
	Training in the areas specific to the business' respective industry was the most commonly cited need, followed by First Aid and Tourism and Hospitality.
Sales	The most critical considerations for employees is the cost of living and housing.
	Businesses indicated the market for their product/service is increasing and that their market share in comparison with competitors is also increasing.
	59% of businesses report that the majority of their sales are to customers within the community or region.
Facilities and Equipment	The most frequent reason for purchasing products or services outside of the area is that the product is not available locally.
	42% of businesses lease the facility in which they operate, and 85% would prefer to own their facility.
	Over half of businesses plan to expand within 3 years, with the vast majority indicating that expansion will occur within the community.
Government Services	Top barriers to expansion are financing and a lack of skilled staff.
	Top rated government services include access to highway/roads, disposal of waste materials, and water and sewerage supply. The lowest ratings include availability of couriers and other road transport services, access to airport facilities, and the availability of buildings for lease or purchase.
	Improvements to the recycling and waste management systems and streamlining the development approval process were the most frequently suggested areas for improvement of government services.
Business Climate	The Calgary International Airport is the most used airport by local businesses.
	The overall business climate was rated as good by most businesses, and the majority of businesses believe that the business climate will improve over the next five years.
	Business climate factors that received the highest ratings include the chamber of commerce, the cultural and recreational amenities, and tourism services.

	Tourism and technology related businesses were the most commonly cited sectors, businesses, or industries that could be attracted to the region.
	The business competitiveness factors that are most important to respondents include improvement of customer service and workplace health and safety.
Assessment and Plans	The overall health of their company was rated as good by 58% of businesses and excellent by 32% of businesses.
	6% of the businesses surveyed indicated that they were at high risk of closing and just 1% indicated they are at high risk of downsizing. The vast majority (over 90%) indicated that the risks of closure or downsizing were low.

Next Steps

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. Research findings suggest that the following action areas have the greatest potential to improve the business climate.

Potential Action Areas

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 1,768 employees. The majority (61%) of employees are full-time, followed by 23% temporary, and 16% part-time. The size of the workforce appears to be increasing, with 48% of businesses indicating that the number of employees at their business has been increasing, and 39% indicating that the number has stayed the same. Employment trends are also expected to remain stable or increase, with the majority of businesses expecting the number of casual staff to stay the same, while the number of full time and part time employees is expected to increase. The majority of businesses (87%) recruit locally. 76% of businesses indicate that they currently face recruitment challenges, 70% anticipate future difficulties, and 64% of businesses stated that there were strategies that could address recruitment. Additionally, 15 respondents noted that the lack of skilled staff was posing a barrier to expansion plans.

Respondents most commonly rely on social media and other internet sources (33%) to recruit employees, with general advertising (29%) also often used, followed by word of mouth (18%), and employment centres (13%). Actions identified by respondents that could prove helpful include providing access to affordable housing, as well as providing training and educational opportunities. The hospitality and food/beverage service industries featured in areas of future recruitment challenges, as did the area of administrative/clerical and sales/service. Targeted actions that focus on the tourism and food and beverage sectors specifically could be considered. Related to recruitment and retention are a number of identified critical considerations for employees which include housing and the cost of living.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with 17% of essential employees under the age of 25. Increasing youth employment may assist in addressing the recruitment challenges that 76% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for low youth employment, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), hosting career and employer information fairs, and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

57% of businesses in the region report being in a growth cycle and 28% are maturing. The majority of businesses are anticipating low to moderate sales growth over the next year, with 39% expecting moderate sales growth between 1 – 9% and 46% expecting 10-24% sales growth. The majority of businesses (59%) indicate that the majority of their sales are to local markets. 68% indicate that they are planning to expand within the next three years, and the majority (80%) indicate that their existing site is adequate. Businesses also report that employment rates are stable, and that they anticipate increases in part time and full time staff over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive, stable report on local business conditions. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Support could come in the form of assistance with navigating local regulations, identifying and securing new sites if appropriate, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to expansion which include financing, lack of skilled staff, and local regulations. It is worth noting that very few (33%) 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.

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be medium in size (28% have between 5 and 9 employees, 43% are located in a facility that is between 1,000 sq. ft. and 4,999 sq.ft., and 39% have annual sales under between \$1 million and \$4.9 million) and independent (just 21% have other locations). The customer base for businesses appears to be diverse, with 47% of businesses indicating that just 1 - 9% of their sales are generated by their top three customers. It is interesting to note that the majority of employees are full-time (61%). Tailoring supports and services to small/medium sized, independent businesses that are focused on the service and tourism sectors will benefit businesses in the Columbia Valley. Services and supports should consider that 40% of functions provided by a business are 'services'. Actions to support and encourage small and medium sized businesses could include specific training targeted to the needs of small businesses, for example providing shared services such as payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include exploring existing supports available from agencies such as the provincial Small Business BC organisation, go2HR, Destination BC, Kootenay Rockies Tourism, CBT's Basin Business Advisors Program, or the Kootenay and Boundary Farm Advisors program.

Supply Sourcing and Procurement

The data indicates that 48% of supplies come from within the local region. The most common response (51%) for the reason why supplies are sourced outside of the local area is that they are not available locally. Interestingly, 58% of respondents indicated that they supply services or products to companies in the community. By far the most common suggestion for a new supplier in the area was for a wholesale supplier for the food and beverage sector. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area

businesses could also be explored. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Local businesses do not appear to engage actively with government procurement processes, with only 9% 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, promotion on relevant websites, and social media channels.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 66% of businesses *do* have a training budget and 52% indicated that training typically occurs locally. 19% of respondents indicated that the lack of skilled staff was a barrier to their expansion plans. 50% of businesses were aware of new trends, technologies and industry changes that will require new skills. Additionally, 75% identified specific areas for training/professional development, including industry specific training, first aid, tourism/hospitality, management, sales, and food safe. There is a preference for online/webinar (35%) or classroom (34%) style formats. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with local 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, yet only 20% of respondents indicated that they have a formal succession plan and under half (46%) have an up-to-date business plan. 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, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future business 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.

Continued Support for Tourism Sector

The Columbia Valley is already invested in the tourism sector with a relatively high percentage (48%) of businesses engaged in tourism related industries (14% in the 'Retail and Wholesale Trade' sector, 28% in the 'Accommodation and Food Services' sector, and 6% in the 'Arts, Entertainment and Recreation' sector). The majority of respondents (66%) indicated that tourism was the economic driver with the greatest growth potential. Respondents also noted that increasing the number of tourism related businesses, followed by technology would benefit the region. Actions to increase and continue the support for the tourism industry could include the continued collaboration between government and local tourism agencies such as Destination British Columbia, Chambers of Commerce, and local businesses. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Addressing Seasonality

The seasonality of the community was identified by 23% of respondents (16 businesses) when asked about weaknesses of the community as a place to do business. Seasonality was also referenced by 8 respondents (12%) as a barrier to growth. A number of businesses referenced the need to expand the tourism season and encourage tourism during the entire year. Action in this area may include reviewing marketing initiatives, engaging with tourism operators to discuss barriers and opportunities to decrease the seasonality challenge, and engage with groups like Kootenay Rockies Tourism and Destination BC to explore options to change this characteristic.

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PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey¹ conducted within the Columbia Valley area during the summer of 2018.

The project was led by the Columbia Valley Community Economic Development Office (CVCEDO), with support from BC Rural Dividend. A local consultant (through the Columbia Valley Chamber of Commerce) and the BRE Lead (Community Economic Development Officer with the Regional District of the East Kootenay) completed interviews. The Columbia Valley Community Economic Development Advisory Committee (CVCEDAC) helped guide the process.

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

This report describes findings from a Business Retention and Expansion (BRE) survey² conducted in the Columbia Valley communities—Village of Radium Hot Springs, District of Invermere, Village of Canal Flats, RDEK Electoral Area F & G, Shuswap Indian Band, and Akisqnuq First Nation and area—during August and September 2018.

Objectives specific to the Columbia Valley BRE project were as follows:

1. Identify the needs, concerns, and opportunities of existing local businesses so 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 local businesses with respect to expansion, relocation and /or retention and follow-up where assistance can be provided;
3. Demonstrate the supportive role of the Columbia Valley Community Economic Development Office and the Chamber of Commerce in the Columbia Valley, and build relationships with the entire business community;
4. Encourage the business community's active involvement in economic development.

¹ Short and Long BRE surveys can be downloaded from: <http://cbrdi.ca/research-areas/applied-research/business-retention-expansion/>

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 was 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.

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 Labour Market specific questions were added to the base survey in order to identify and address labour market supply and demand, uncover some emerging labour market trends, and determine barriers to labour retention within the Columbia Valley area.

The Data Set

A list of prospective BRE interviewees was developed over a number of months. From that long list, the CVCEDO and Chamber of Commerce rationalized the list further. The final filter was performed by the targeted businesses themselves, if they did not want to participate, or could not find a window of time during the study period to schedule an interview.

Rather than trying to find an equal proportion of types and sizes of businesses, or trying to create a random sample, the CVCEDO's initial targeted list started with key businesses that were perceived to be growing or undergoing some changing condition. Businesses were sorted into the North American Industry Classification System (NAICS) categories. Great effort was made to cover businesses of all sizes throughout the Columbia Valley.

Data Collection

In August 2018, the Columbia Valley Community Economic Development Office sent out email invitations to the targeted businesses. Follow up telephone calls, personal visits, and subsequent emails were undertaken to arrange an interview time with each business.

Interviews were conducted in private, with the business owner, or site manager, and the interviewer. Some interviews were completed in less than 1 hour, but most took about 2 hours.

Ryan Watmough, CVCEDO, and Tess Bekkering, BRE Interviewer with the CVCC, entered the data from each of their interviews into the ExecutivePulse system, helping to maintain confidentiality and data security. Data entry required an average of 30 minutes.

Interview forms were safely stored both before and after entering the data to further protect confidentiality and data security.

Data Input, Analysis and Reporting

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

RESEARCH FINDINGS

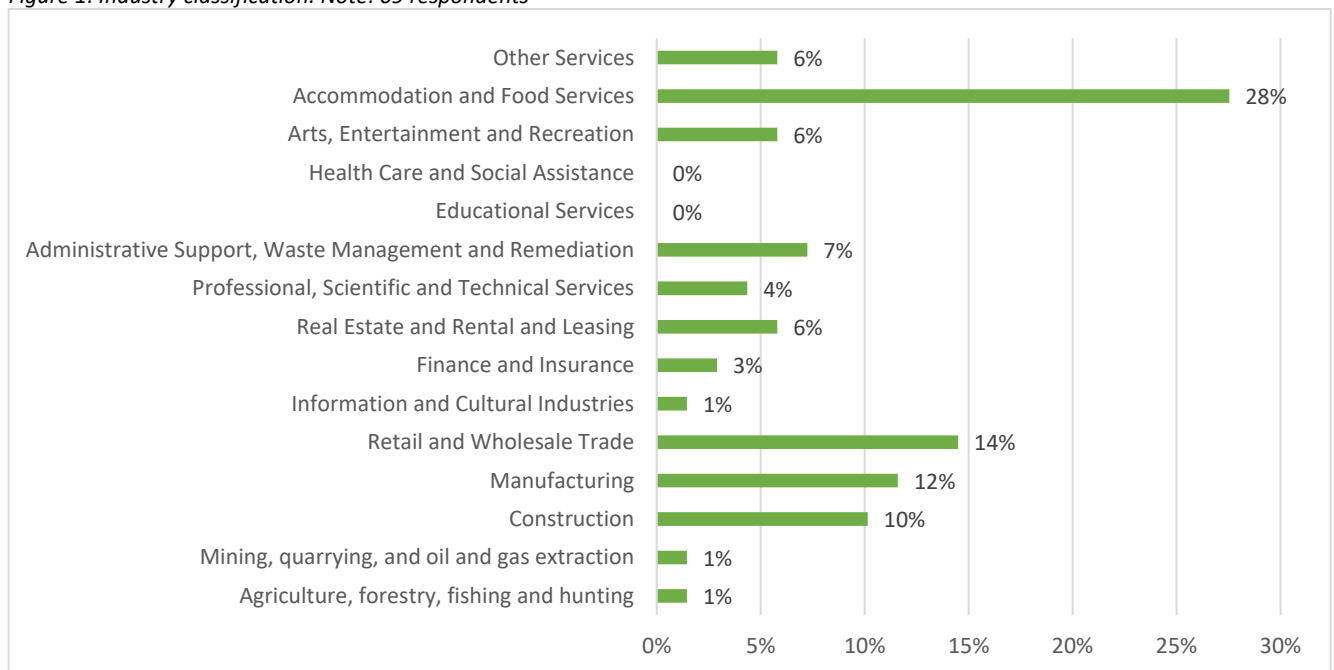
Note that some questions allow multiple responses, which can result in the number of responses being higher than the number of respondents.

Company Information

Type of Product/Service Offered

Interviewed businesses represent a diverse cross-section of industries, with an emphasis in the tourism and service sectors. Most common are Accommodation and Food Services (28% or 19 respondents), Retail and Wholesale Trade (14% or 10 respondents). Manufacturing (12% or 8 respondents) and Construction (10% or 7 respondents) were also well represented. Note that businesses in the Health Care and Social Assistance and Educational Services sectors were not included, primarily due to the lack of such businesses in the Columbia Valley.

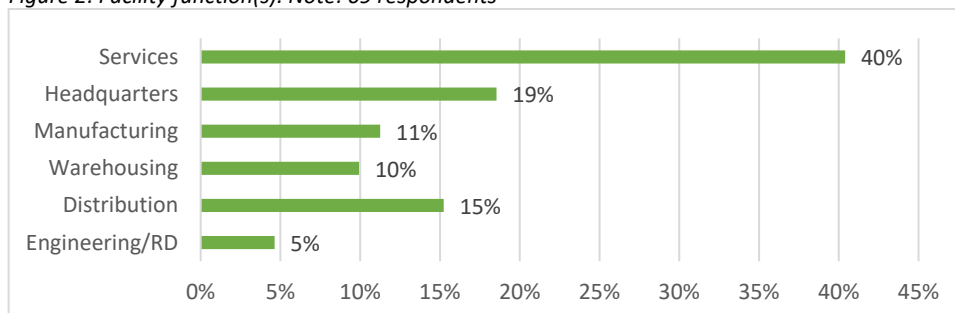
Figure 1: Industry classification. Note: 69 respondents



Facility Function

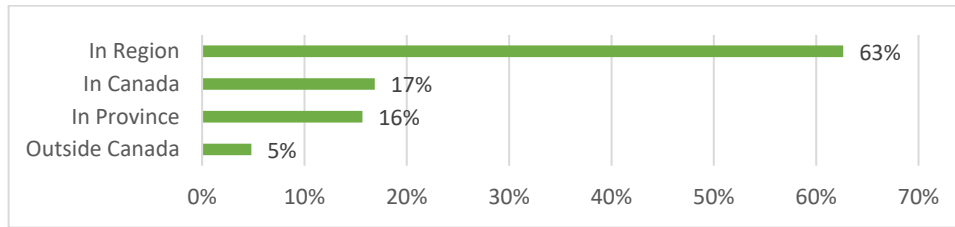
Businesses most commonly (40% or 61 respondents) indicated that their facility provides services. Other functions include 'headquarters' (19% or 28 respondents) and 'distribution' (15% or 23 respondents). Fewer respondents indicated that their facility serves an engineering/research and development function, manufacturing or warehousing function.

Figure 2: Facility function(s). Note: 69 respondents



The majority of respondents (63% or 52 respondents) reported that their competition was coming from within the regional area³.

Figure 3: Location of primary competitors. Note: 64 respondents



Factors for Success

When asked what factors made their company successful in this region, the highest number of respondents cited the workforce (22% or 25 businesses), the location (19% or 22 businesses), and the quality of the product or service (11% or 13 businesses).

Figure 4: Key words in respondents' discussions of the factors that make them successful in this region

"We believe in employees and their success, so we invest in their personal development."

"Word of mouth & Good and loyal team!"

"Location, natural capital (scenery, hot springs); proximity to Calgary; friendly staff."

"Great staff and low to no turnover."

"Attention to detail; quality of local ingredients"

"First class, local staff."

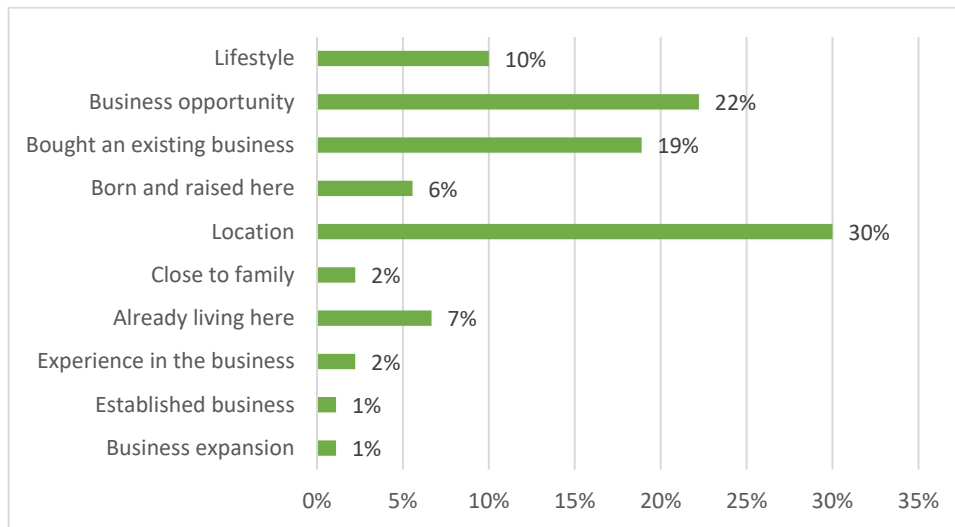
"Tourism to the Valley - Location on throughway / highway."

³ Multiple competitors were listed by respondents resulting in more responses than number of respondents.

Choosing the Columbia Valley

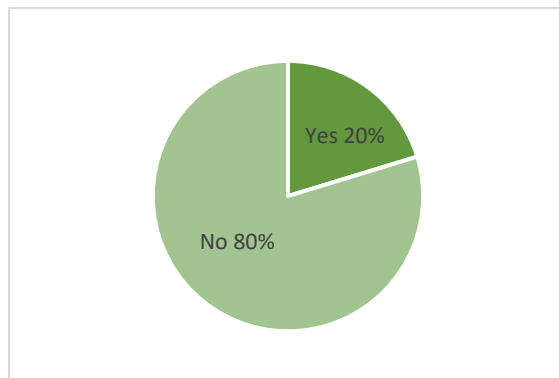
Respondents most frequently cited the location (30% or 27 respondents) followed by a business opportunity (22% or 20 respondents) in their reasons for choosing the Columbia Valley to site their business. Other factors include the purchase of an existing business (19% or 17 respondents), the lifestyle (10% or 9 respondents) and those who were born and raised and stayed, or were already living in the area.

Figure 5: Reasons for choosing the Columbia Valley. Note: 69 respondents



Other Locations

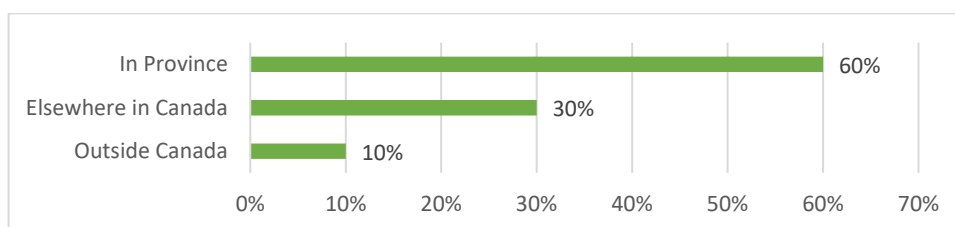
Figure 6: Other Locations. Note: 69 respondents



20% of respondents (14 respondents) indicated that their company has other locations.

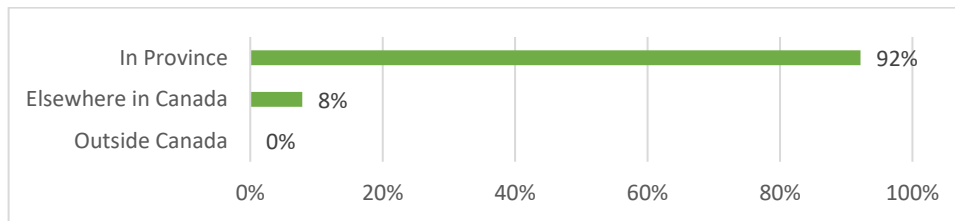
60% of those other locations (12 respondents) are in other areas of the province, 30% (6 respondents) are in other parts of Canada.

Figure 7: Location of Other Locations. Note: 14 respondents



92% of respondents (47 businesses) reported that their headquarters are located within British Columbia, 8% (4 businesses) indicated that they are headquartered in other parts of Canada, and none of the businesses surveyed had a headquarters outside of the country.

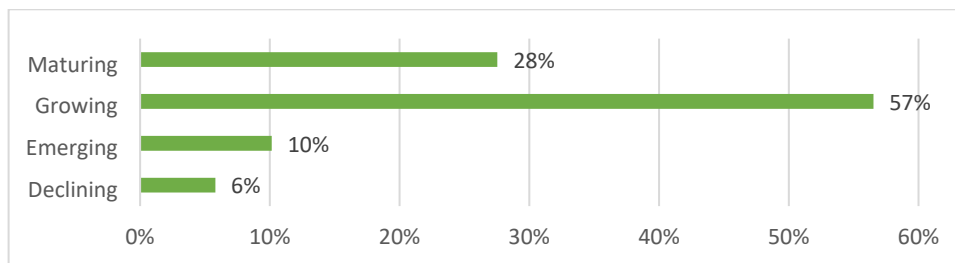
Figure 8: Location of headquarters. Note: 51 respondents



Age and Life Cycle Stage

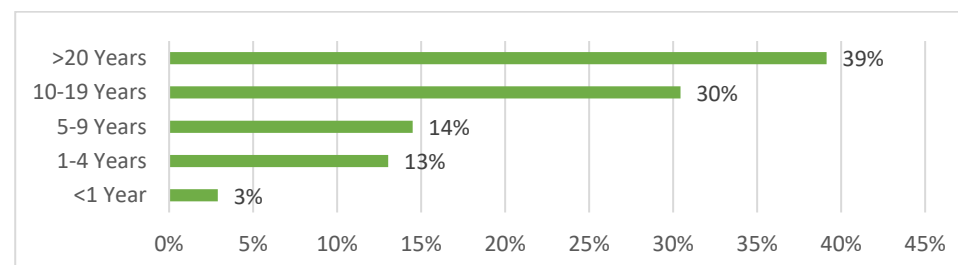
Over half of all respondents (57% or 39 respondents) reported that their business is in the 'growing' life cycle stage. Another 28% (19 businesses) indicated that their business is in the 'maturing' stage. Only 10% (7 businesses) indicated that they are in the 'emerging' stages, while 6% (4 businesses) indicated they were declining.

Figure 9: Life cycle stage. Note: 69 respondents



The largest number of businesses (27 respondents or 39%) reported that they have been in business for over 20 years. A significant number reported that they have been in business for 10 - 19 years (21 respondents or 30%).

Figure 10: Length of time in business. Note: 69 respondents



Ownership and Management

96% of all companies surveyed are privately owned, with just 4% publicly owned. Most respondents (55 respondents or 80%) indicated that their business is classified as a corporation, while 9% (6 respondents) indicated that they are a sole proprietorship. The remainder of businesses identified as a partnership (4% or 3 respondents), non-profit (3% or 2 respondents), limited liability partnership (3% or 2 respondents), and other (1% or 1 respondent).

Figure 11: Type of business. Note: 69 respondents

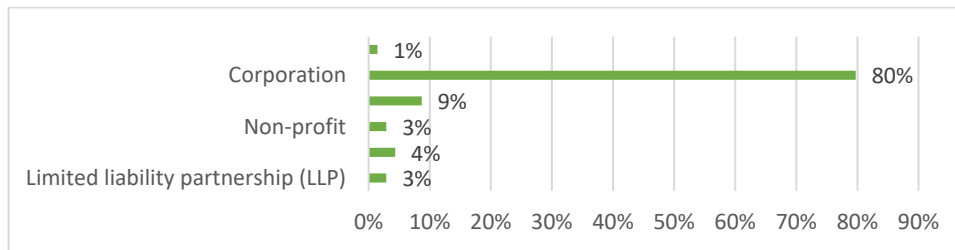
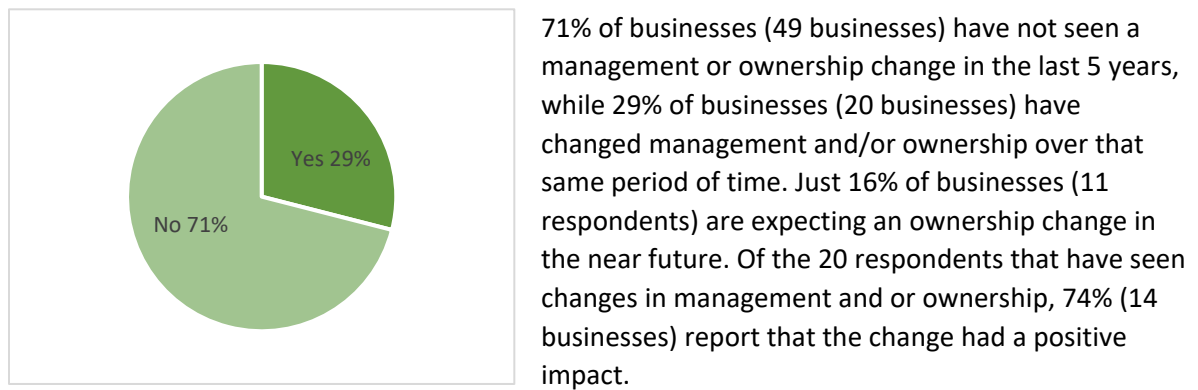


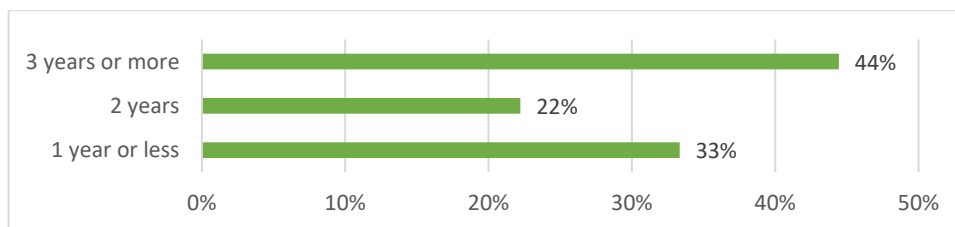
Figure 12: Ownership and management changes in last 5 years. Note: 69 respondents



Succession and Business Plans

Of the 11 businesses (16%) that responded and reported a pending ownership change, 4 (44%) expect the change will happen in three or more years, 3 (33%) expect the process to take 1 year or less, and 22% or 2 businesses anticipates it taking 2 years.

Figure 13: Anticipated timeline for ownership change. Note: 9 respondents



63% of respondents (5 respondents) expect that the current owner will exit the business by selling it to a non-family member, while 25% (2 respondents) expect it to be sold/transferred to a family member. 13% (1 business) expect it to be sold to another company.

Figure 14: Anticipated exit strategy. Note: 8 respondents

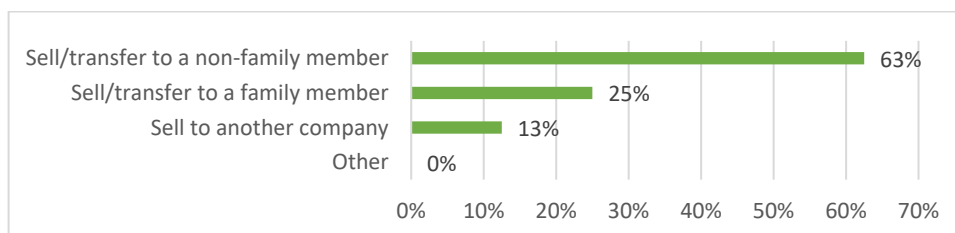
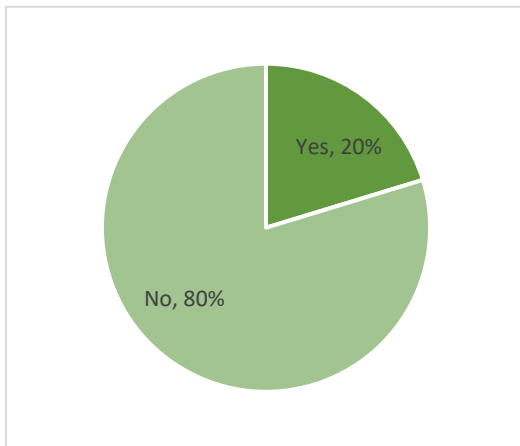
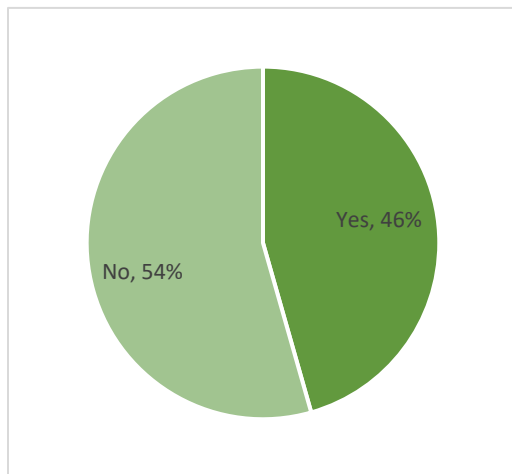


Figure 15: Existence of formal succession plan. Note: 69 respondents



Only 20% (14 respondents) of businesses reported that they have a formal succession plan in place, and just 29% (20 businesses) have identified a successor for their business. Of those that completed a succession plan, 79% received assistance in its preparation.

Figure 16: Existence of current business plan. Note: 69 respondents



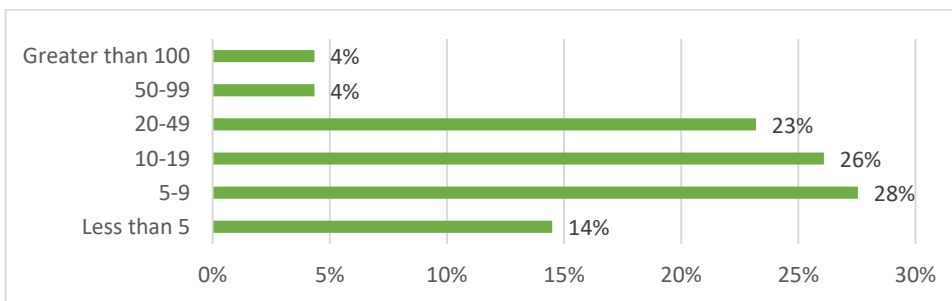
Just under half of respondents (46% or 32 respondents) indicated that they have a business plan in place.

Local Workforce

Size of Workforce

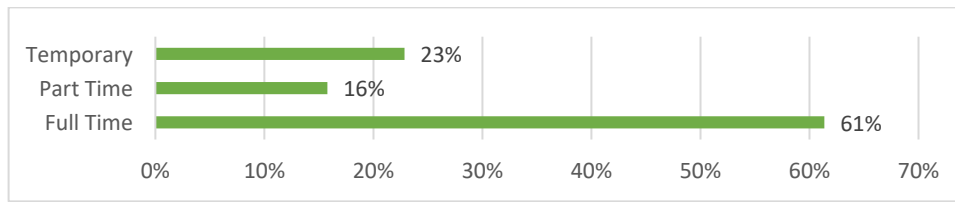
The 69 businesses interviewed reported a total of 1,768 employees. 28% or 19 of the businesses surveyed indicated that they have between 5 and 9 employees, and 26% or 18 businesses indicated that they have between 10 and 19 employees.

Figure 17: Total number of employees. Note: 69 respondents



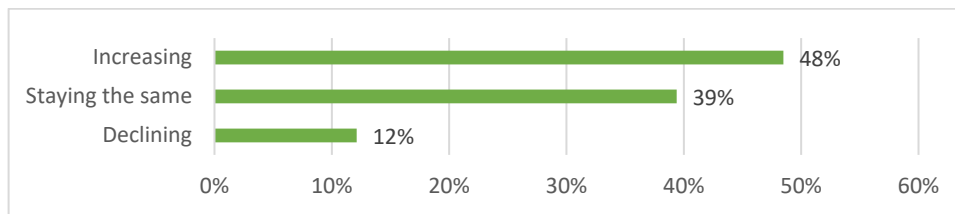
61% (1085) of employment positions at surveyed businesses are full-time, while 16% (279) are part time, and 23% (404) are temporary.

Figure 18: Nature of employment. Note: 69 respondents



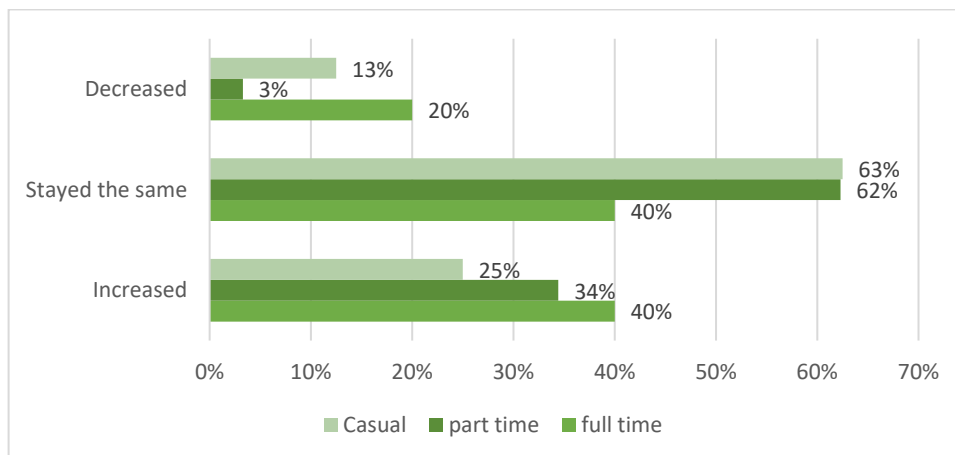
48% of respondents (32 businesses) indicated that the number of employees at their business has been increasing. While 39% (28 businesses) indicated that the size of their workforce has stayed the same. 12% (8 businesses) indicated a decrease.

Figure 19: Historical employment trend⁴. Note: 69 respondents



The last three years have generally seen stability in the size of the workforce, with between 40% and 63% of businesses reporting that the number of employees has stayed the same, and between 25% and 40% reporting that employment over that three year time period has increased. Interestingly, the employment trend for full-time staff saw a 20% decrease over the previous three years.

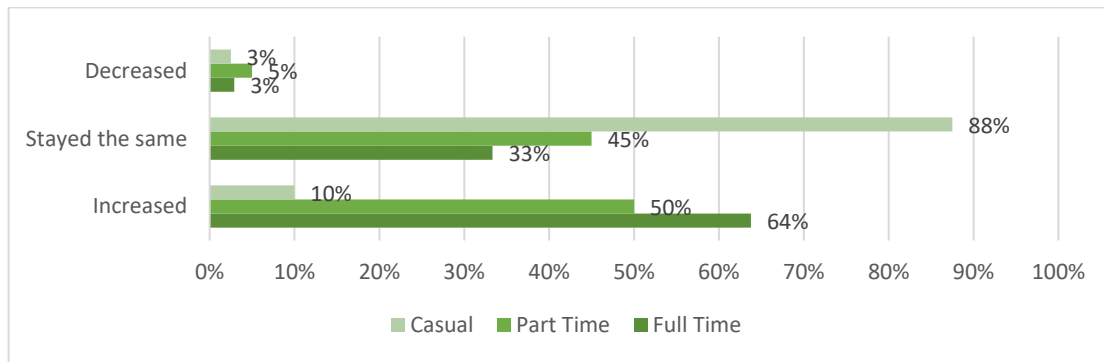
Figure 20: Employment trend over last 3 years. Note: #of respondents varies



The majority of businesses interviewed expect the size of their casual workforce to stay the same over the next 3 years (88% or 11 respondents), while the number of full time staff is expected to increase (64% of respondents or 44 respondents). The expectation for part time staff is that the numbers will either stay the same (45% or 27 respondents) or increase (50% or 30 respondents).

⁴ The question considered a 10 year historical trend.

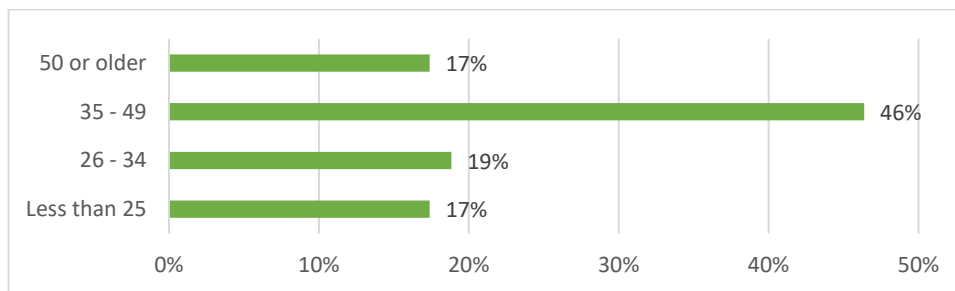
Figure 21: Employment trend over next 3 years. Note: #of respondents varies



Workforce Demographics

46% (32 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 19% (13 respondents) of businesses indicated that the majority of their workforce is between 26 and 34 years old.

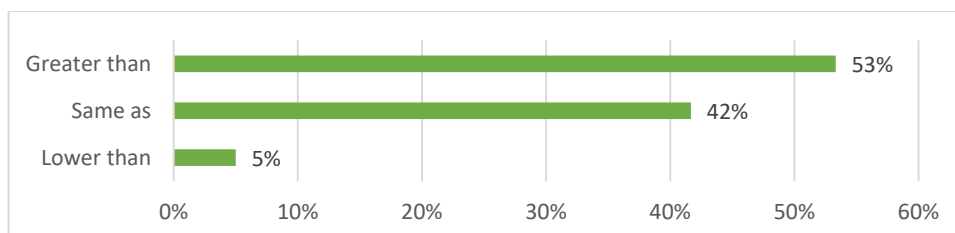
Figure 22: Age of the majority of essential employees. Note: 69 respondents



Wages

When reporting on average wages for skilled or professional workers, the majority of responses indicated they pay between \$20 and \$29 per hour (42% or 22 businesses) and between \$30 and \$49 per hour (35% or 18 businesses). The most commonly reported average hourly wage for semi-skilled workers (50% or 25 businesses) was between \$15 - \$19, and the most commonly reported average wage for entry-level workers nearly matched at \$13 - \$14.99 (37% or 17 businesses) or between \$15 and \$19.99 (39% or 18 businesses). 53% of respondents (32 respondents) reported that their wage scale is greater than other businesses in the region.⁵

Figure 23: Wages in relation to other businesses in the region. Note: 60 respondents

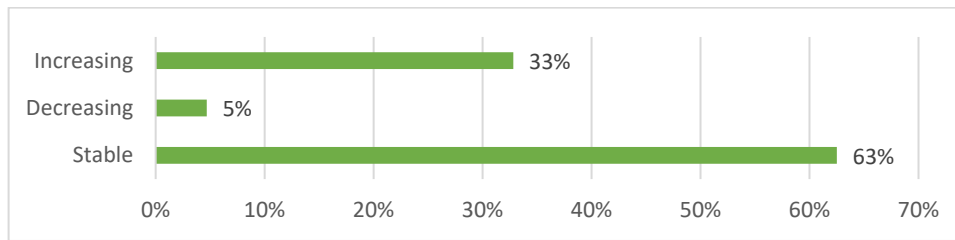


⁵ Detailed wage data is found in Appendix A.

Recruitment and Retention

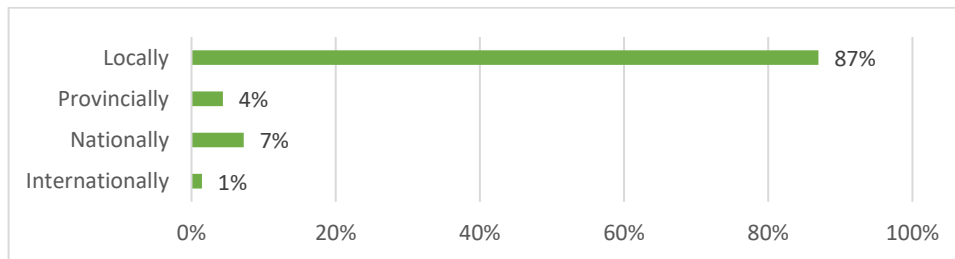
Of those businesses that responded, 63% (40 respondents) indicated that the number of unfilled positions at their company would remain constant in the near term.

Figure 24: Trend in unfilled positions. Note: 64 respondents



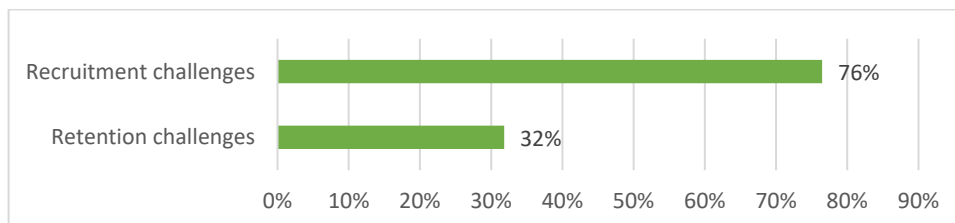
The vast majority of respondents (87% or 60 respondents) reported that they primarily recruit employees from local labour markets. 7% (5 respondents) recruit at a national level, while 4% (3 respondents) report that they recruit at the provincial level. International recruitment was only identified by one respondent.

Figure 25: Location of workforce recruitment. Note: 69 respondents



Of the 69 respondents, 76% (52 respondents) indicated that they have experienced recruitment challenges and 32% (22 respondents) indicated that they have experienced retention challenges.

Figure 26: Recruitment and retention challenges. Note: # of respondents varies



When asked what efforts their business has undertaken to retain employees, the most frequent response was competitive wages (31% or 37 respondents), followed by benefits (15% or 18 respondents). Flexible scheduling (12% or 14 respondents) and training for staff (10% or 12 respondents) were also frequently cited.



Figure 27: Key words and responses in respondents' discussion of retention efforts

"staff parties to boost morale!"

“provide housing to new staff”

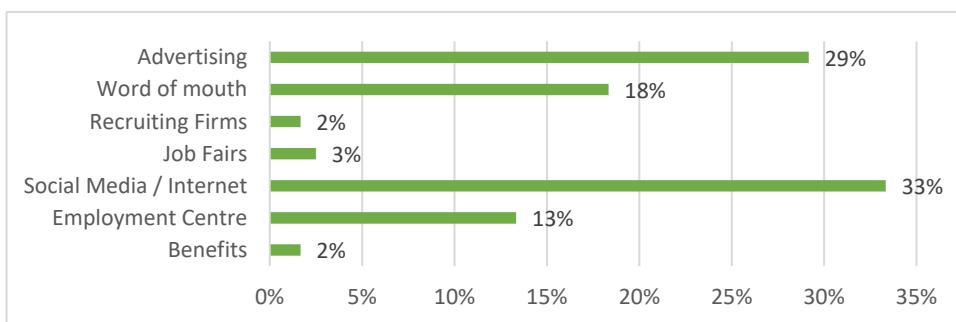
*“increased availability of
benefits”*

"offer bonuses and raises"

"flexible working schedule"

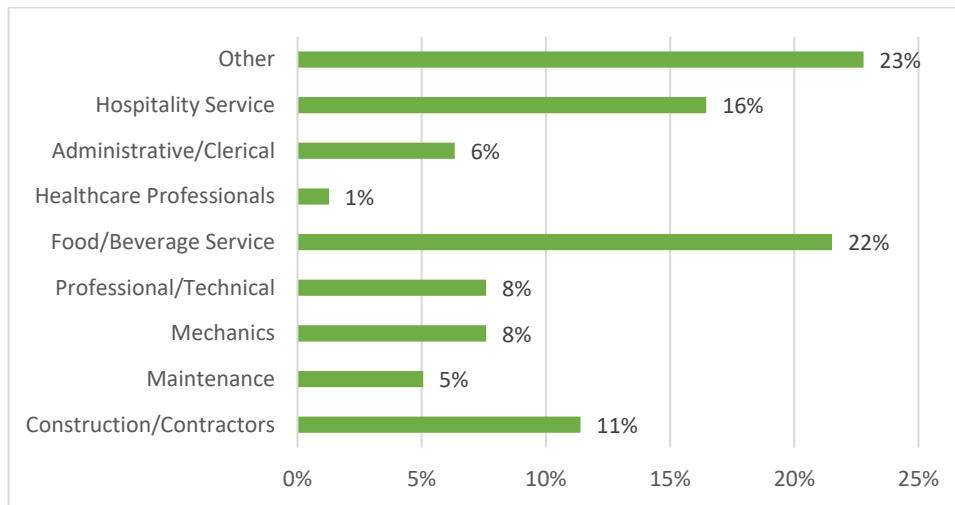
When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often were the use of social media and other internet resources (33% or 40 respondents) and advertising (29% or 35 respondents). Respondents also use a wide variety of other means, including word of mouth, employment centres, recruitment firms, job fairs, and offering benefits.

Figure 28: Recruitment Activities. Note: 62 respondents



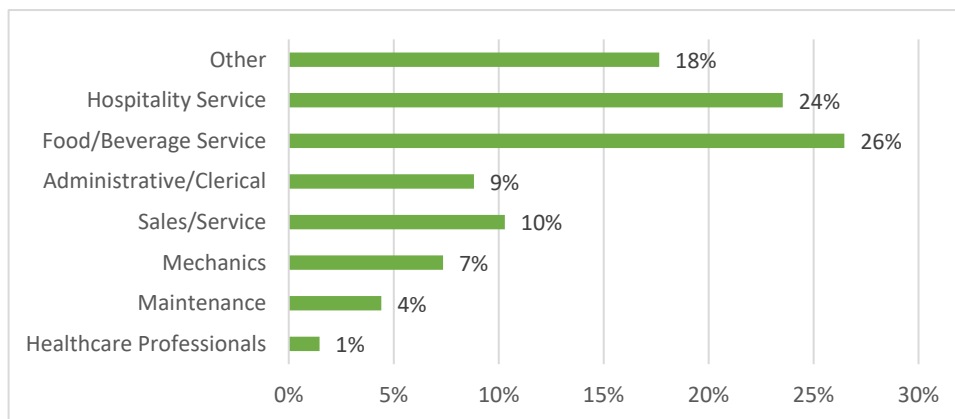
Of the 52 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include food and beverage service (22% or 17 respondents) and hospitality service (16% or 13 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 29: Current recruitment areas. Note: 52 respondents



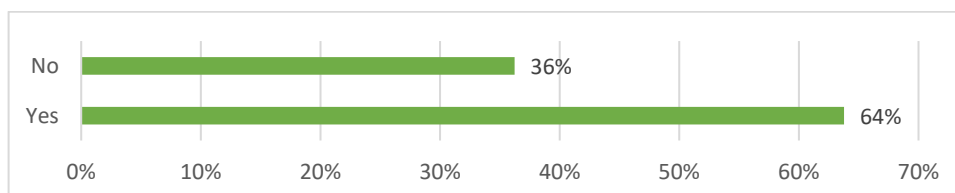
70% of respondents (48 businesses) anticipate future recruitment difficulties over the next 3 to 5 years. The most commonly anticipated recruitment areas which may prove challenging include food and beverage service (26% or 18 respondents) and hospitality service (24% or 16 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 30: Future areas where recruitment may be challenging. Note: 48 respondents



64% of respondents (44 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. 43% (20 respondents) believed that providing access to housing was important, while 13% (6 respondents) suggested that training and education opportunities were necessary, and another 13% (6 respondents) indicated that transportation was an area that could support recruitment efforts.

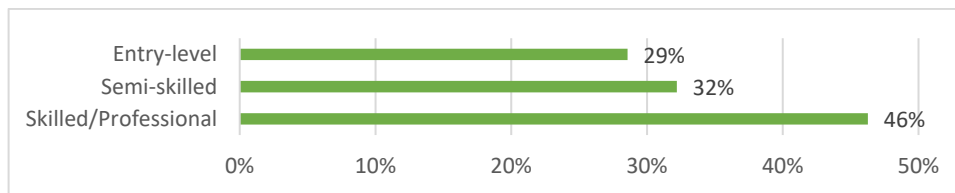
Figure 31: Strategies to overcome employee recruitment challenges. Note: 69 respondents



Skills and Training

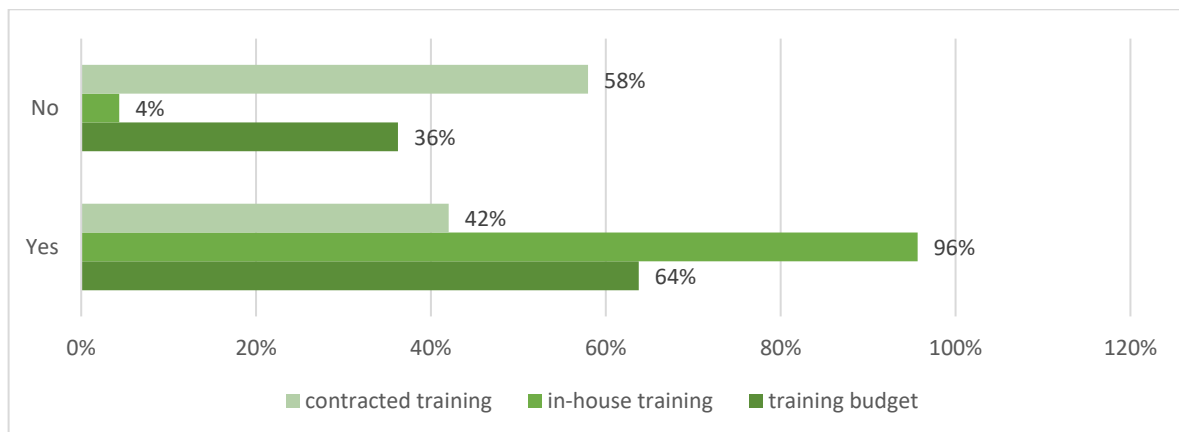
46% (31 respondents) indicated that over half of their workforce is comprised of skilled or professional workers, 32% (19 respondents) indicated that their workforce is mainly semi-skilled workers and 29% (16 respondents) indicated that entry-level workers make up the majority of their workforce.

Figure 32: Skill level of majority of workforce. Note: # of respondents varies



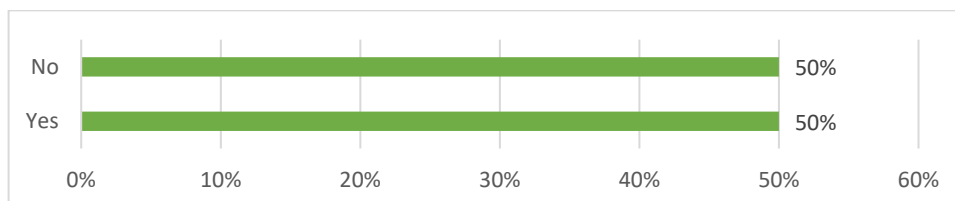
64% (44 businesses) indicated that there is a training budget to upgrade employee skills. 96% (66 businesses) indicated that their company offers in-house training and 42% (29 businesses) use contracted training.

Figure 33: Training Budget. Note: # of respondents varies



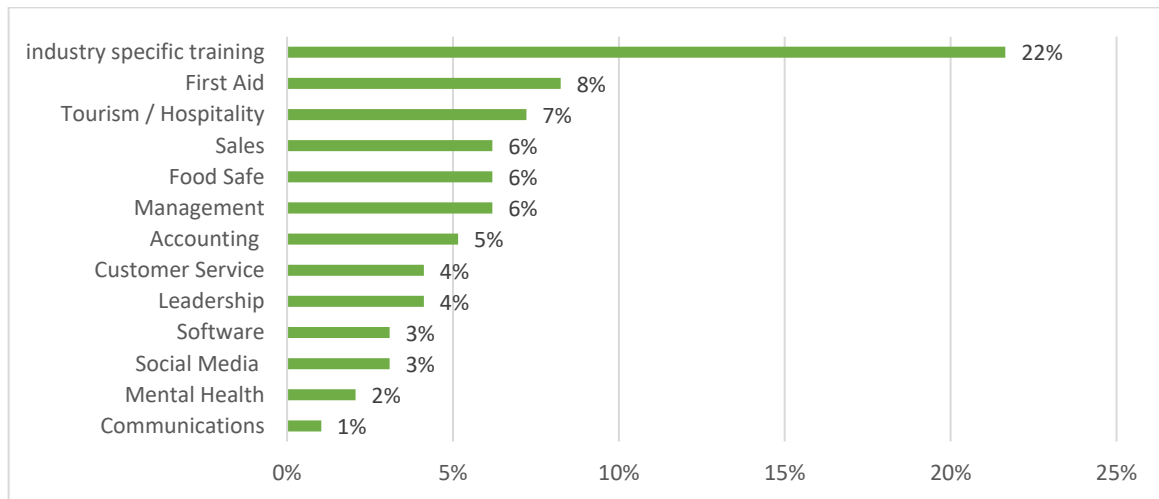
50% of respondents (34 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

Figure 34: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills. Note: 68 respondents



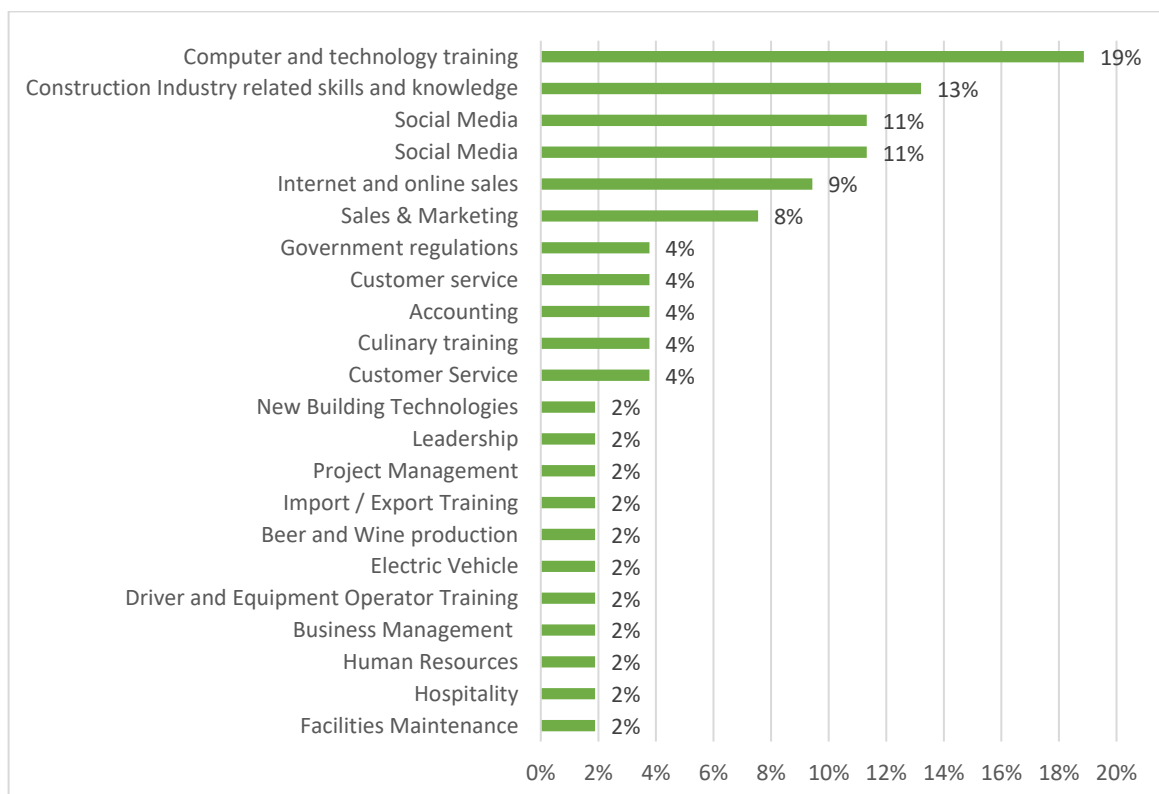
75% or 52 respondents indicated that there are areas of training or professional development that would benefit their business. Most commonly listed among these areas was training specific to their industry (22% or 21 respondents), followed by first aid (8% or 8 respondents) and tourism and hospitality (7% or 7 businesses).

Figure 35: Training or professional development needs. Note: 52 respondents



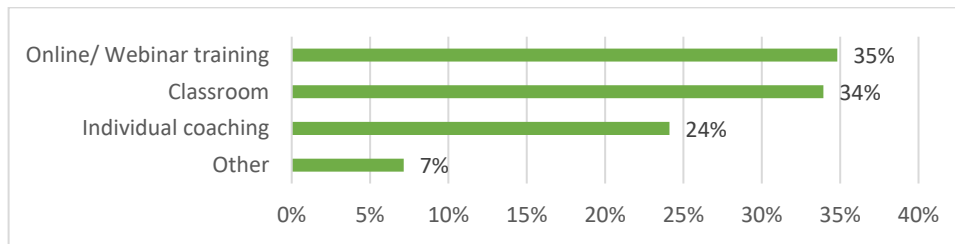
When asked what new training might need to be considered in the next five years, the most commonly cited responses were in the areas of computer skills (19% or 10 businesses), construction industry related skills and knowledge (13% or 7 businesses) and social media (11% or 6 businesses).

Figure 36: Areas for new Training in next five years. Note: 53 respondents



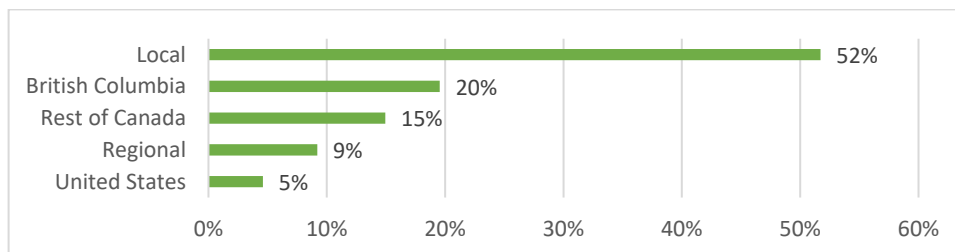
35% of respondents (39 businesses) stated that they prefer training when it is delivered through an online or webinar format, while 34% (38 businesses) preferred classroom training, and 24% had a preferred for individual coaching (27 businesses).

Figure 37: Preferred modes of training. Note: 67 respondents



52% of respondents (45 businesses) typically seek training opportunities that are offered locally, and 20% (17 businesses) travel to other areas in the province for their training or throughout the rest of the country (15% or 13 businesses). Fewer training opportunities are sought elsewhere in the region or in the United States.

Figure 38: Usual training locations. Note: 65 respondents



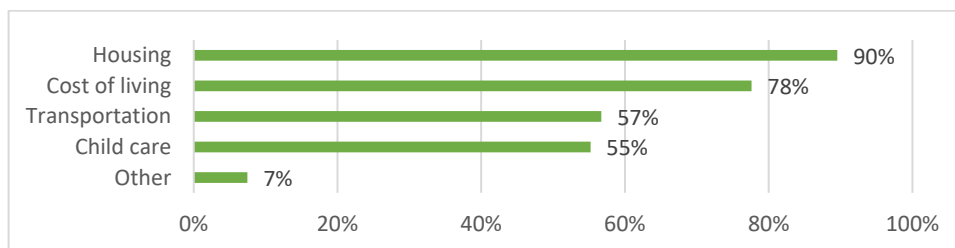
Unions

3 businesses (4%) surveyed reported that they have union status.

Employees

The most frequently cited critical issues for employees are housing (90% or 60 businesses) and the cost of living (78% or 52 businesses). Child care (55% or 37 businesses) and transportation (38% or 38 businesses) issues were also common. For a list of factors included in the “other” category charted below, refer to Appendix A.

Figure 39: Critical considerations for employees. Note: 67 respondents

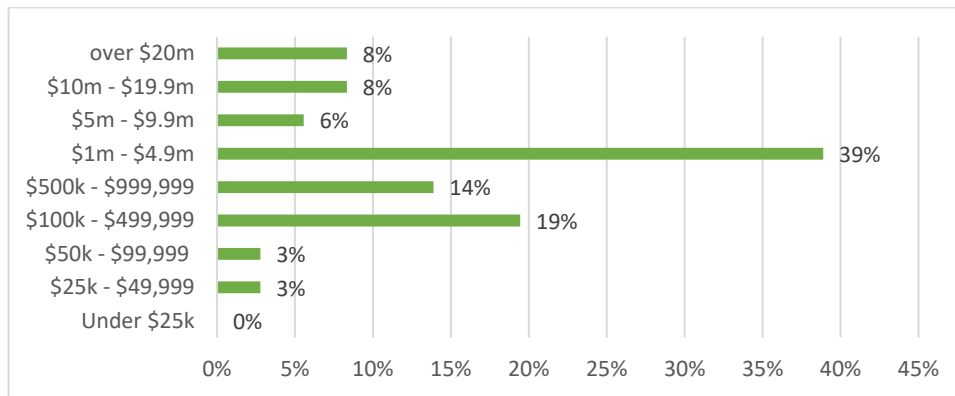


Sales

Market Size and Share

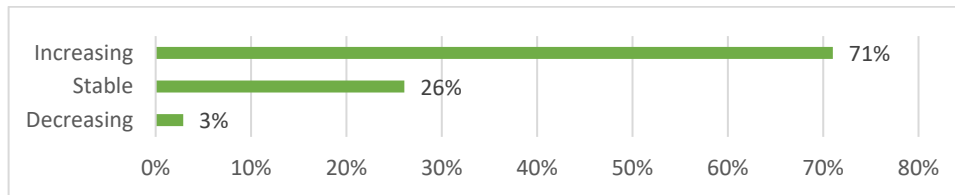
The highest number of respondents (14 businesses or 39%) reported annual sales between \$1 million and \$4.9 million. The second highest number of respondents (7 businesses or 19%) reported annual sales of between \$100,000 and \$499,000.

Figure 40: Annual sales. Note: 36 respondents



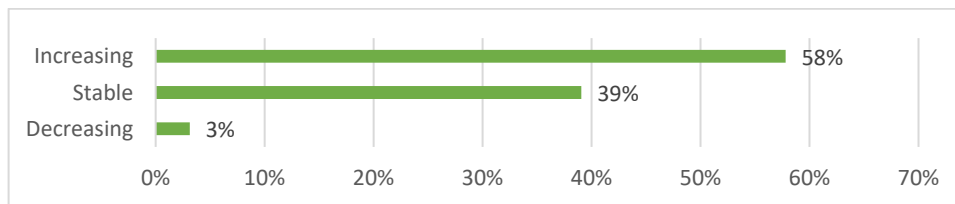
The majority of businesses interviewed (71% or 49 businesses) indicated that the size of the market for their product or service is increasing. Another 26% (18 businesses), reported that the market is stable.

Figure 41: Status of market for product/service. Note: 69 respondents



58% (37 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 39% (25 businesses) indicated that it is stable. A small number of respondents (3% or 2 businesses) indicated that their market share is decreasing.

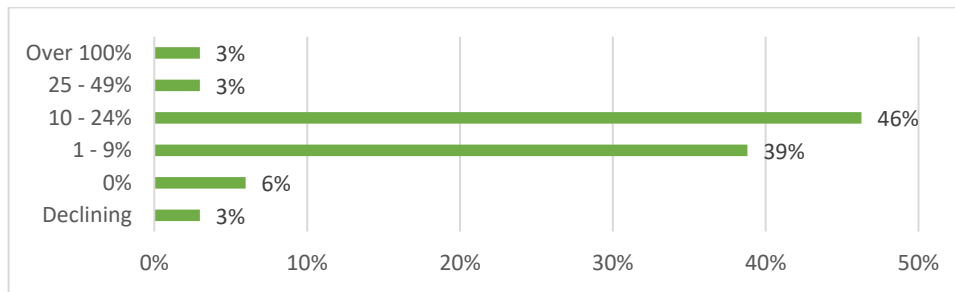
Figure 42: Market Share in Comparison to Competitors. Note: 64 respondents



Growth

46% of respondents (31 businesses) expect to see moderate growth in sales over the next year in the realm of 10 – 24%. Lower growth in sales of 1-9% is projected by 39% of respondents (26 businesses). A combined 6% (total of 4 businesses) expect strong sales growth of over 25%. 6% (4 businesses) of respondents expect their sales to remain stagnant, while a further 3% (2 businesses) expect sales to decline.

Figure 43: Projected sales growth in the next year. Note: 67 respondents

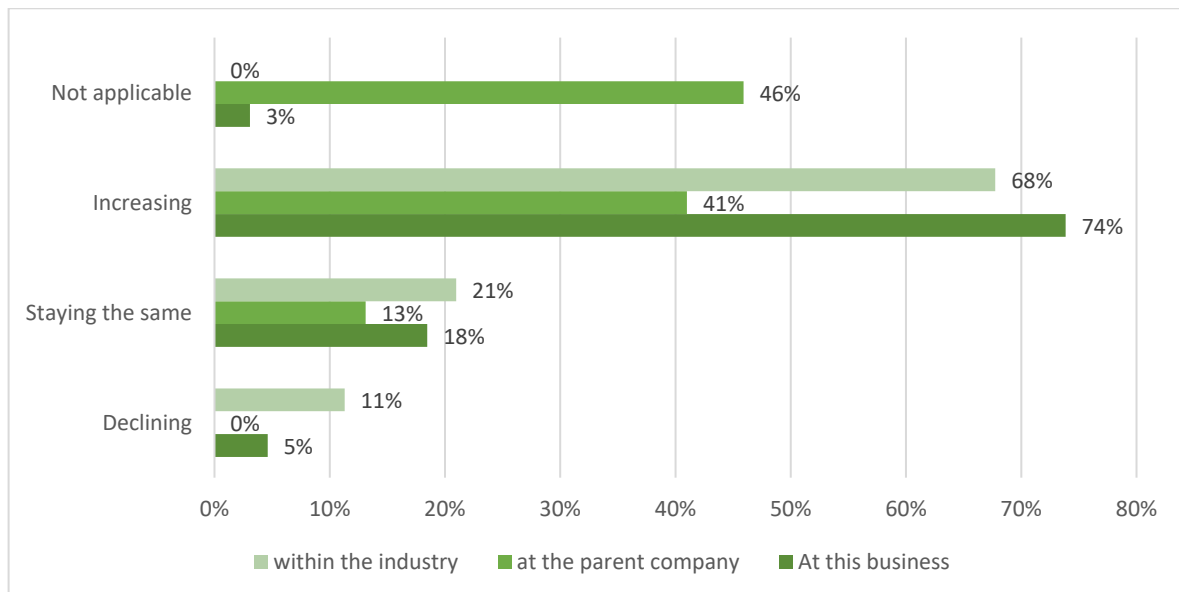


The majority of responses (74% or 48 businesses) indicated that sales at their business have increased over time, 18% (12 businesses) indicated that sales have remained relatively stable and 5% (3 businesses) reported that sales have declined.

41% or 25 businesses reported that sales at their parent company have historically increased, 13% (8 businesses) reported that they have stayed the same, and none reported a decline. It is worth noting the high non response rate/not applicable response to this question.

68% percent of respondents (42 businesses) reported that sales within their industry have been increasing, while 21% (13 businesses) reported that sales have stayed the same, and an additional 11% (7 businesses) indicated sales in their industry are declining.

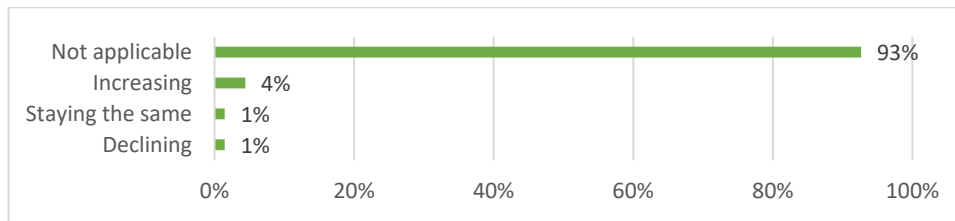
Figure 44: Historic sales trend. Note: # of respondents varies



Export Sales

Of the 5 businesses that reported exporting to international markets, 4% (3 businesses) indicated that their export sales have increased. Note that 93% of respondents (63 businesses) found the question to be not applicable.

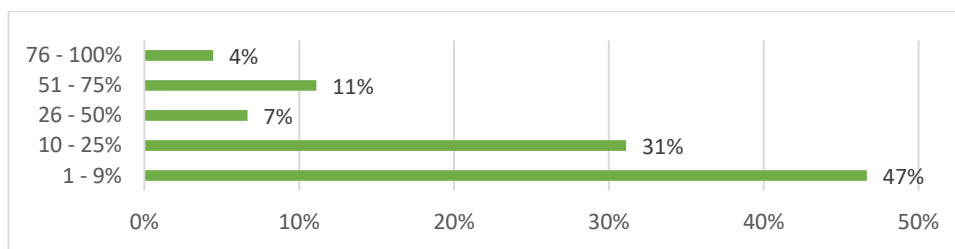
Figure 45: Export sales trend. Note: 68 respondents



Source of Sales

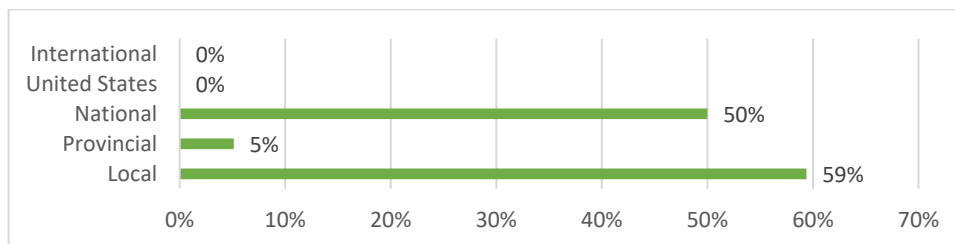
The customer base among Columbia Valley businesses appears to be fairly reliant on a diverse customer base, with the largest percentage of respondents (47% or 21 businesses) indicating that 1 – 9% of their sales are generated by their top three customers.

Figure 46: Sales generated by top three customers. Note: 45 respondents



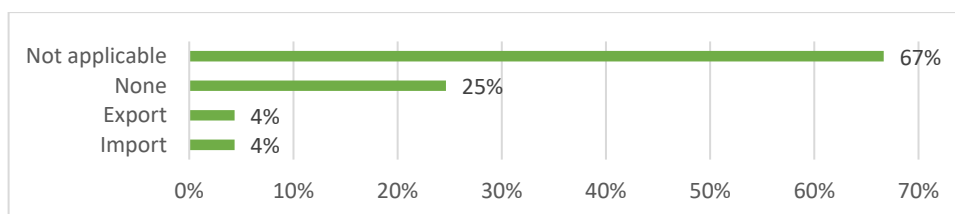
A majority of respondents (59%) indicated that over 50% of their sales are to customers within the local community or region. 5% indicated that over 50% of their sales are within the province and 50% indicated the majority of their sales are to a national market. No respondents reported that the majority of their sales are to the U.S. or to international markets. Additionally, when asked whether they supply products or services to any company in the community, 58% (40 respondents) indicated that they did.

Figure 47: Geographic source of majority of sales. Note: # of respondents varies



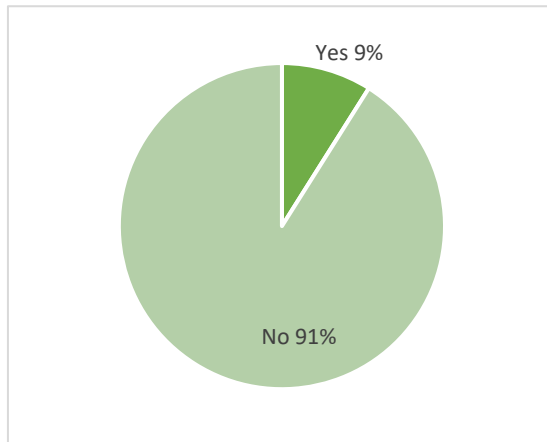
Just 3 respondents (4%) indicated that they import goods or services from other countries. 91% of respondents did not find the question applied to them, or do not engage in international trade.

Figure 48: International trade status. Note: 69 respondents



Procurement

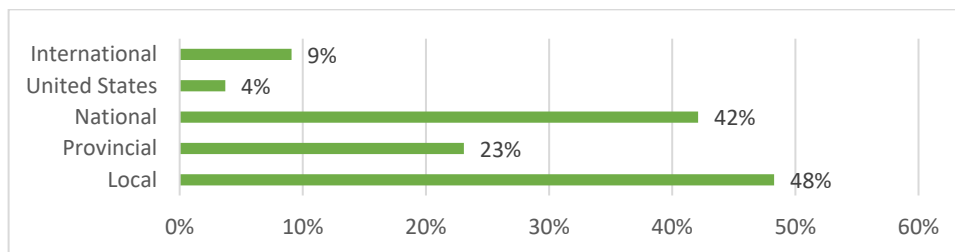
Figure 49: Engagement with government procurement processes. Note: 69 respondents



Only 9% of businesses (6 respondents) indicated that they engage in government procurement.

48% (28 businesses) indicated that the majority of their supplies come from businesses located within the local area. 42% of respondents (24 businesses) reported that they purchase a majority of their supplies from national sources.

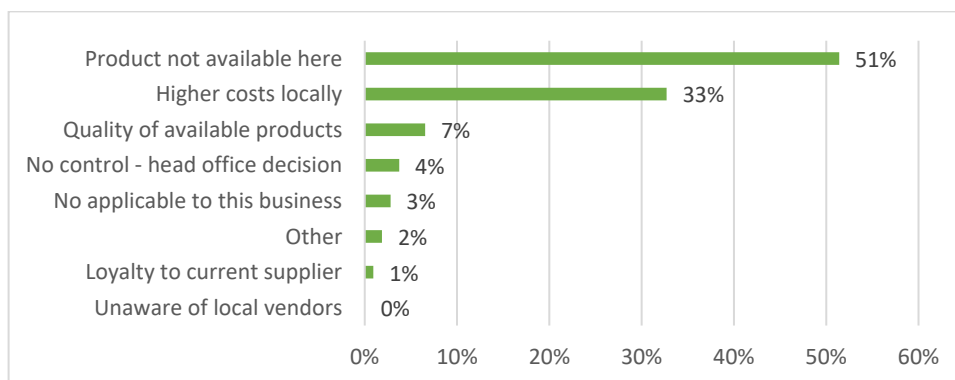
Figure 50: Geographic source of majority of supplies. Note: # of respondents varies



Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the highest number of businesses (51% or 55 respondents) indicated that the products they need are not available locally.

Figure 51: Reason for out-of-area purchasing. Note: 65 respondents

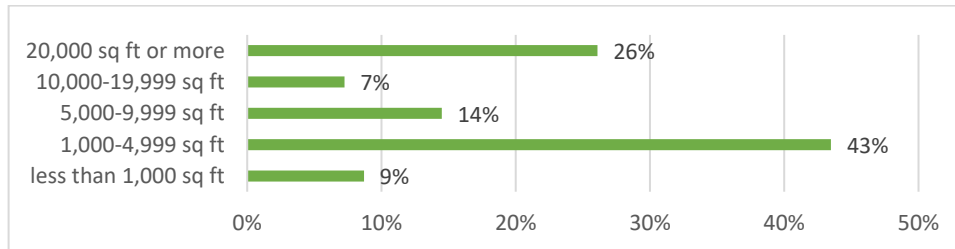


Facilities and Equipment

Size and Condition

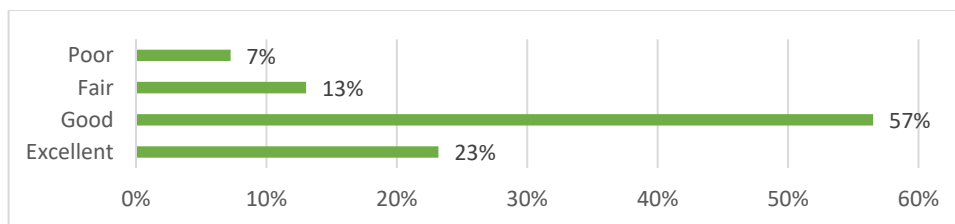
43% of respondents (30 businesses) reported that their facility is between 1,000 square feet and 4,999 square feet in size, and another 26% (18 businesses) indicated it was 20,000 square feet or greater.

Figure 52: Size of facility. Note: 69 respondents



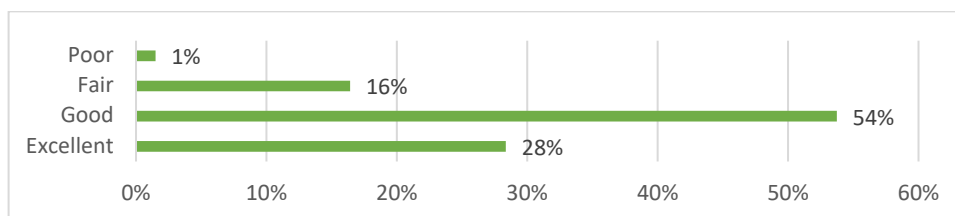
23% of respondents (16 businesses) indicated that their facility is in excellent condition. Another 57% (39 businesses) indicated that it is in good condition and 13% (9 businesses) reported that their facility is in fair condition. 7% (5 businesses) reported that their facility is in poor condition.

Figure 53: Condition of facility. Note: 69 respondents



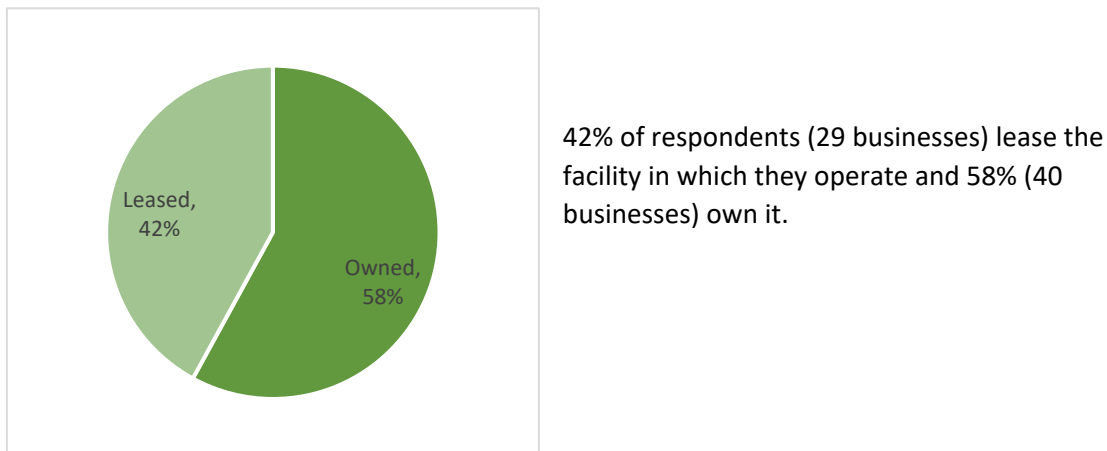
54% of respondents (36 businesses) indicated that their equipment is in good condition. 28% (19 businesses) indicated that it is in excellent condition and 16% (11 businesses) report their equipment is in fair condition, with just 1% (1 business) in poor condition.

Figure 54: Condition of equipment. Note: 67 respondents



Ownership

Figure 55: Ownership status of facility. Note: 69 respondents



Of the 29 businesses that lease their facility, and provided a response to the question, 60% (6 businesses) have less than 1 year remaining on their lease and another 40% (4 businesses) have between 3 and 5 years remaining. The majority of respondents that lease their facility (83% or 25 businesses) intend to renew their current lease agreement.

Figure 56: Length of time remaining on lease. Note: 10 respondents

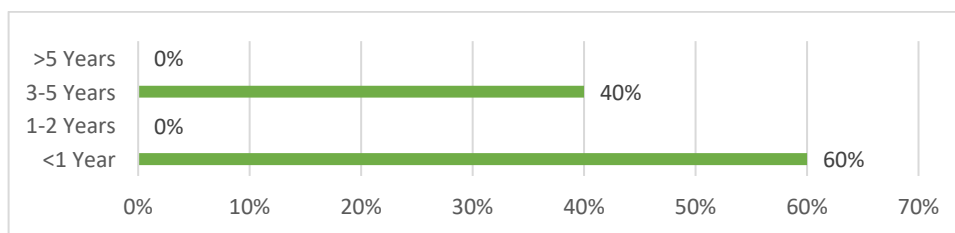
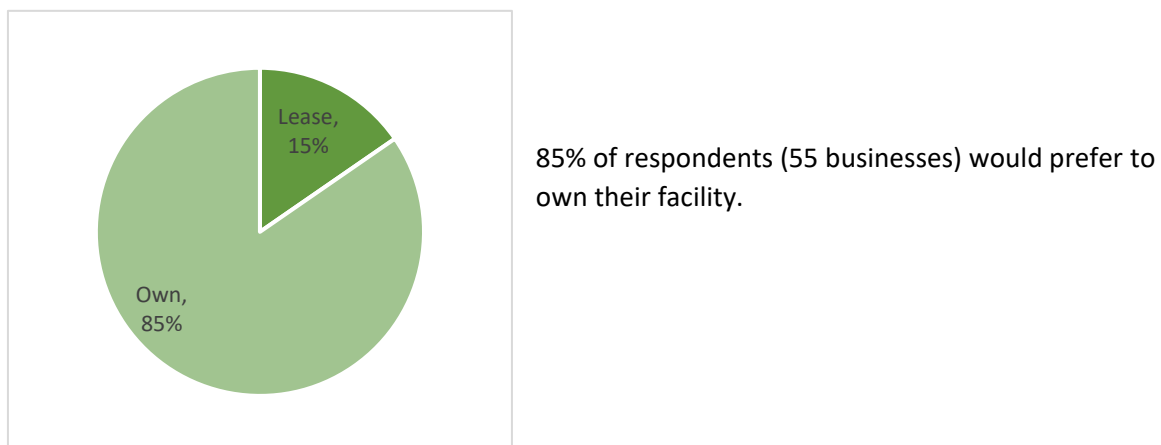


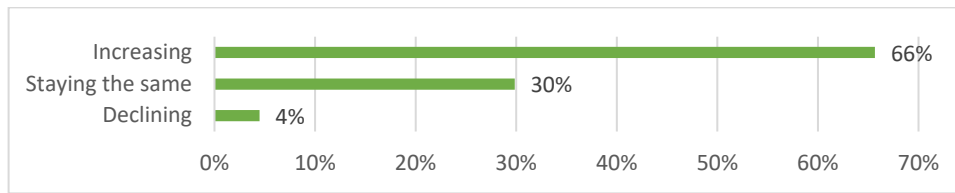
Figure 57: Ownership preference. Note: 65 respondents



Investment and Expansion

66% of respondents (44 businesses) indicated that their company's investment in their facility has increased over the past 18 months, while 30% (20 businesses), indicated that the investment has stayed the same. Only three businesses (4%) indicated that investment in their facility has decreased over the same time period.

Figure 58: Historical Investment in facility (past 18 months). Note: 67 respondents



61% of respondents (42 businesses) indicated that there *was* room for expansion at their site, and 33% (23 businesses) indicated that there *was not* room at their site.

Figure 59: Room for expansion. Note: 69 respondents

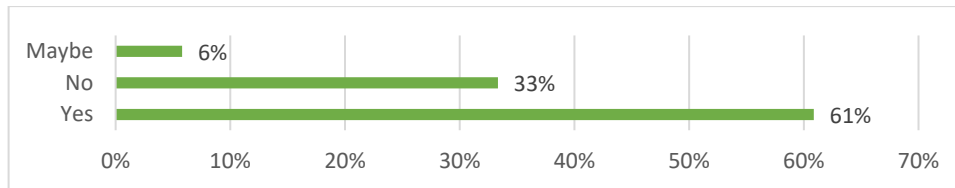
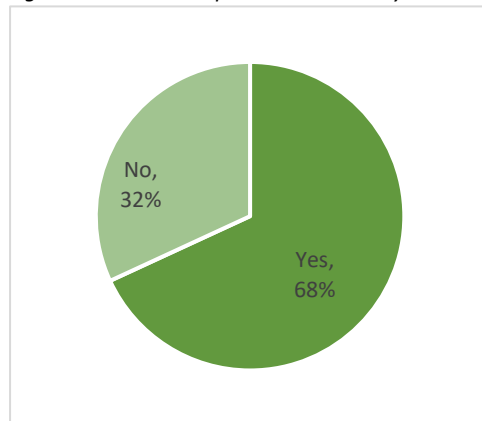
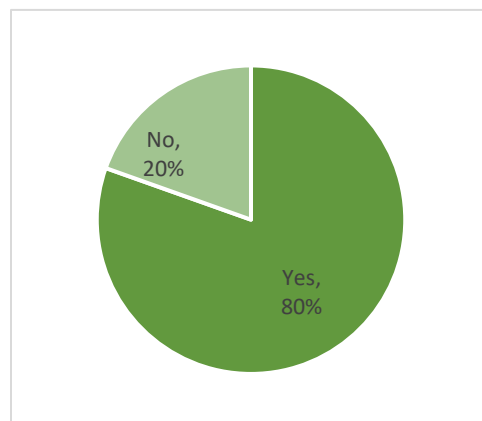


Figure 60: Plans to expand within three years. Note: 69 respondents



68% of respondents (47 businesses) plan to expand within three years, 32% (22 businesses) do not.

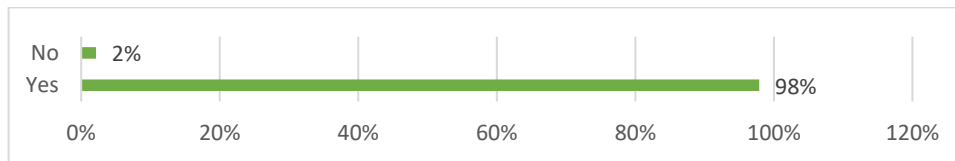
Figure 61: Adequacy of current site to support expansion. Note: 46 respondents



Of the 47 businesses planning expansion within the next three years, 80% (37 businesses) reported that their current site will be adequate. Notably however, 9 businesses (20%) reported that they will have to look for a new site to meet their planned expansion needs.

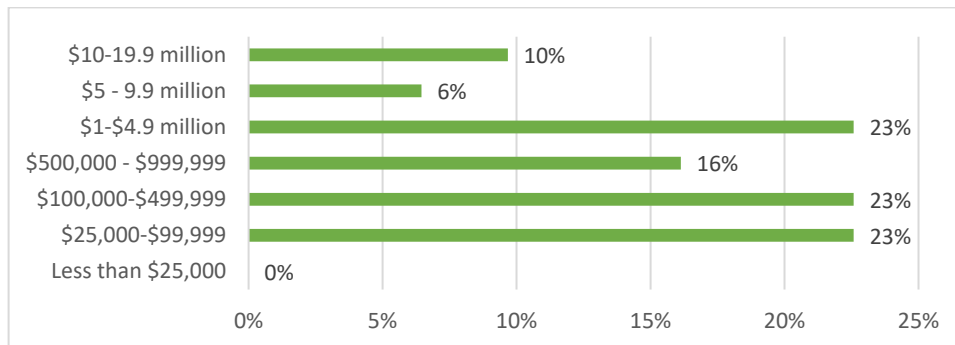
The vast majority of the 47 businesses planning to expand (98% or 46 businesses) indicated that expansion will occur within the community.

Figure 62: Expansion to occur in community. Note: 47 respondents



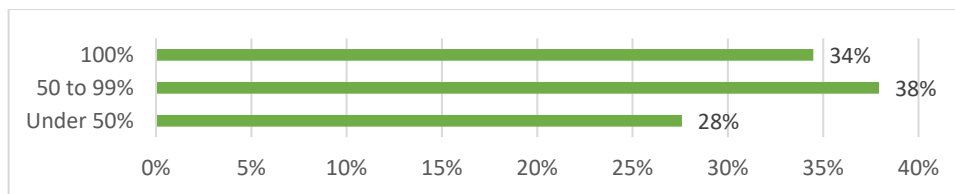
The total investment anticipated for the planned expansion plans ranges substantially. 23% (7 businesses) anticipate investing between \$25,000 and \$99,999, an additional 23% (7 businesses) are planning slightly larger investments in the range of \$100,000 to \$499,999, while an additional 23% (7 businesses) are planning investments between \$1 – \$4.9 million.

Figure 63: Estimated expansion investment. Note: 31 respondents



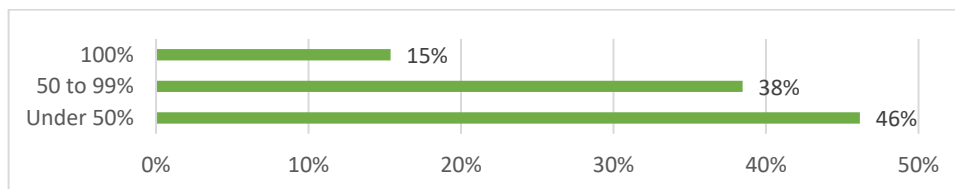
Of the 47 businesses planning expansion, 28% (8 businesses) stated that they expect to spend under 50% of their expansion budget on equipment and technology, while 38% (11 businesses) indicated that 50% - 99% of their expansion budget will be devoted to equipment and technology. An additional 34% (10 businesses) will devote 100% of their expansion budget to equipment and technology upgrades.

Figure 64: Component of expansion budget for equipment and technology. Note: 29 respondents



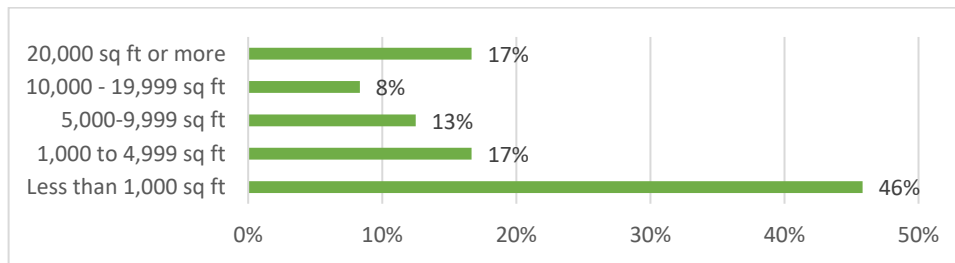
12 respondents (46% of businesses) expect to spend under 50% of their expansion budget on real estate, while another 38% (10 businesses) expect to spend 50 – 99%.

Figure 65: Component of expansion budget for real estate. Note: 26 respondents



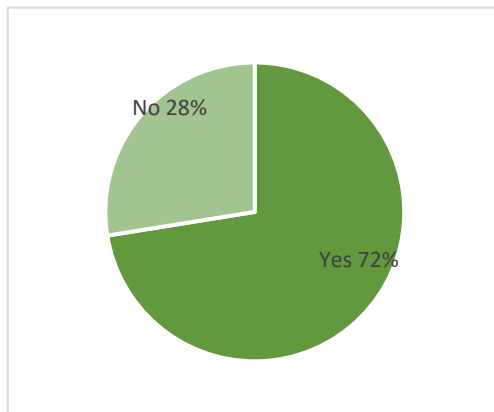
46% (11 respondents) of businesses indicated their facility will expand by less than 1,000 square feet. 17% (4 respondents) of businesses anticipated an expansion of between 1,000 and 4,999 square feet, while an additional 17% (4 businesses) expected an expansion of 20,000 sq.ft or more.

Figure 66: Size of facility expansion. Note: 24 respondents



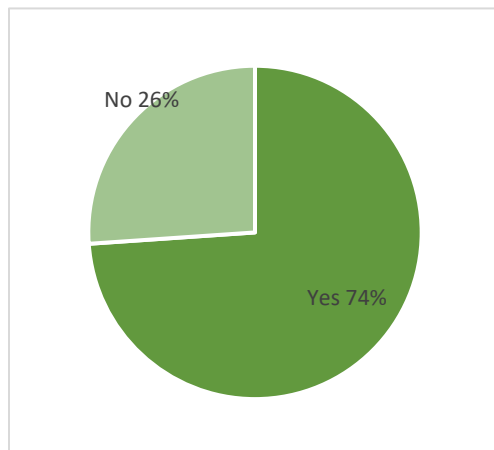
Facility Upgrades

Figure 67: Recent facility upgrades. Note: 69 respondents



72% of businesses (50 businesses) indicated that there had been recent facility upgrades. Of those 50 businesses, 38% (18 businesses) indicated that those upgrades were completed in the last 3 months.

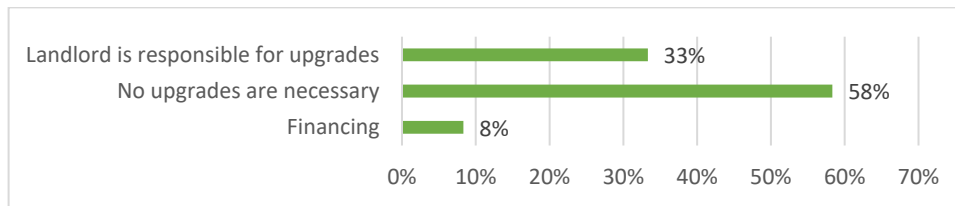
Figure 68: Planning facility upgrades. Note: 69 respondents



74% (51 businesses) indicated that they are planning facility upgrades, and that the majority (35% or 15 businesses) of those planning upgrades will occur in the next 3 months.

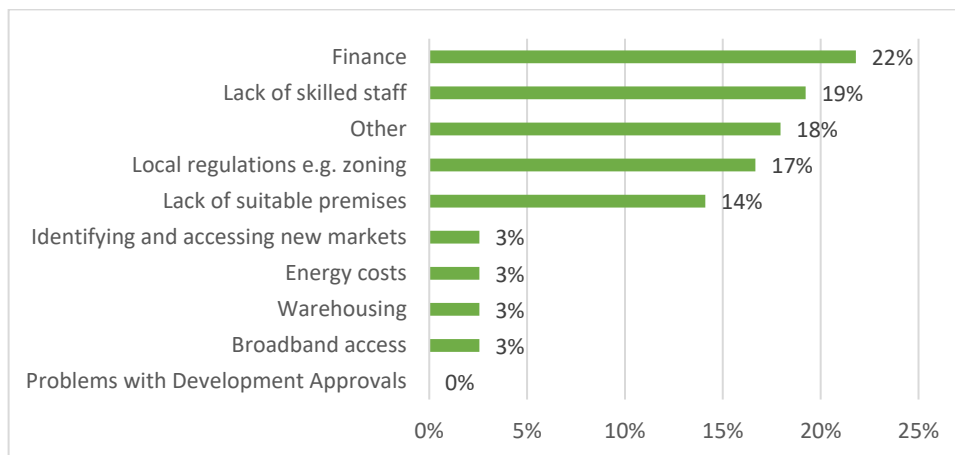
Respondents were also asked to identify any barriers to upgrading. The most frequently cited response was that upgrades were not necessary (58% or 7 businesses). Other factors cited include lack of control (33% or 4 businesses) and financing (8% or 1 businesses).

Figure 69: Barriers to upgrading. Note: 12 respondents



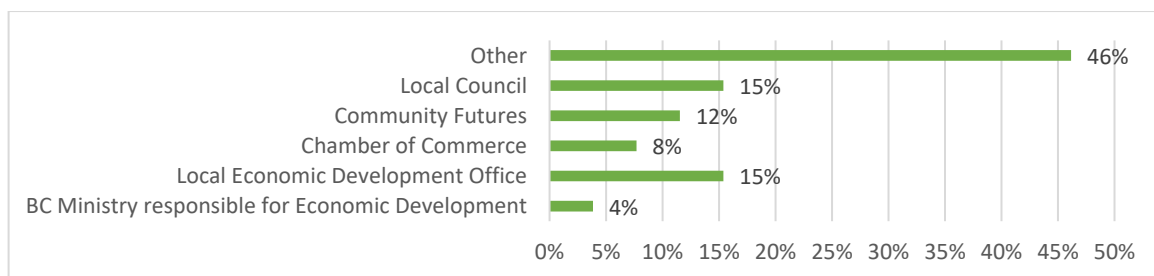
Respondents cited a variety of factors that act as constraints to their expansion. Most common of those were financing (22% or 17 businesses), lack of skilled staff (19% or 15 businesses), and local regulations (17% or 13 businesses). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 70: Barriers to expansion. Note: 45 respondents



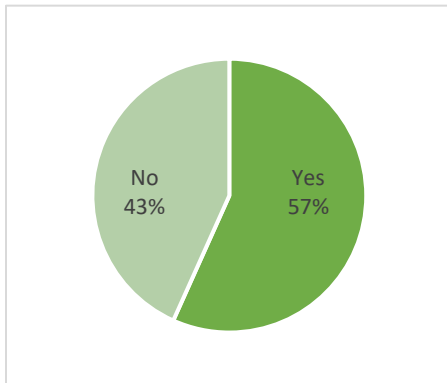
Just 33% of businesses planning an expansion (17 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest numbers had approached the local council (15% or 4 businesses) or the local economic development office (15% or 4 businesses). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 71: Organizations approached for expansion assistance. Note: 17 respondents



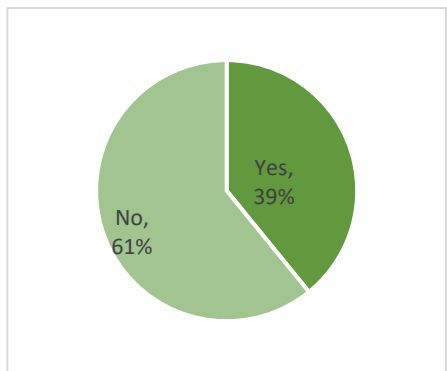
Energy Efficiency

Figure 72: Considering energy efficiency in expansion plans. Note: 67 respondents



57% of respondents (38 businesses) are considering energy efficiency in their expansion plans.

Figure 73: Awareness of BC Hydro Power Smart. Note: 69 respondents



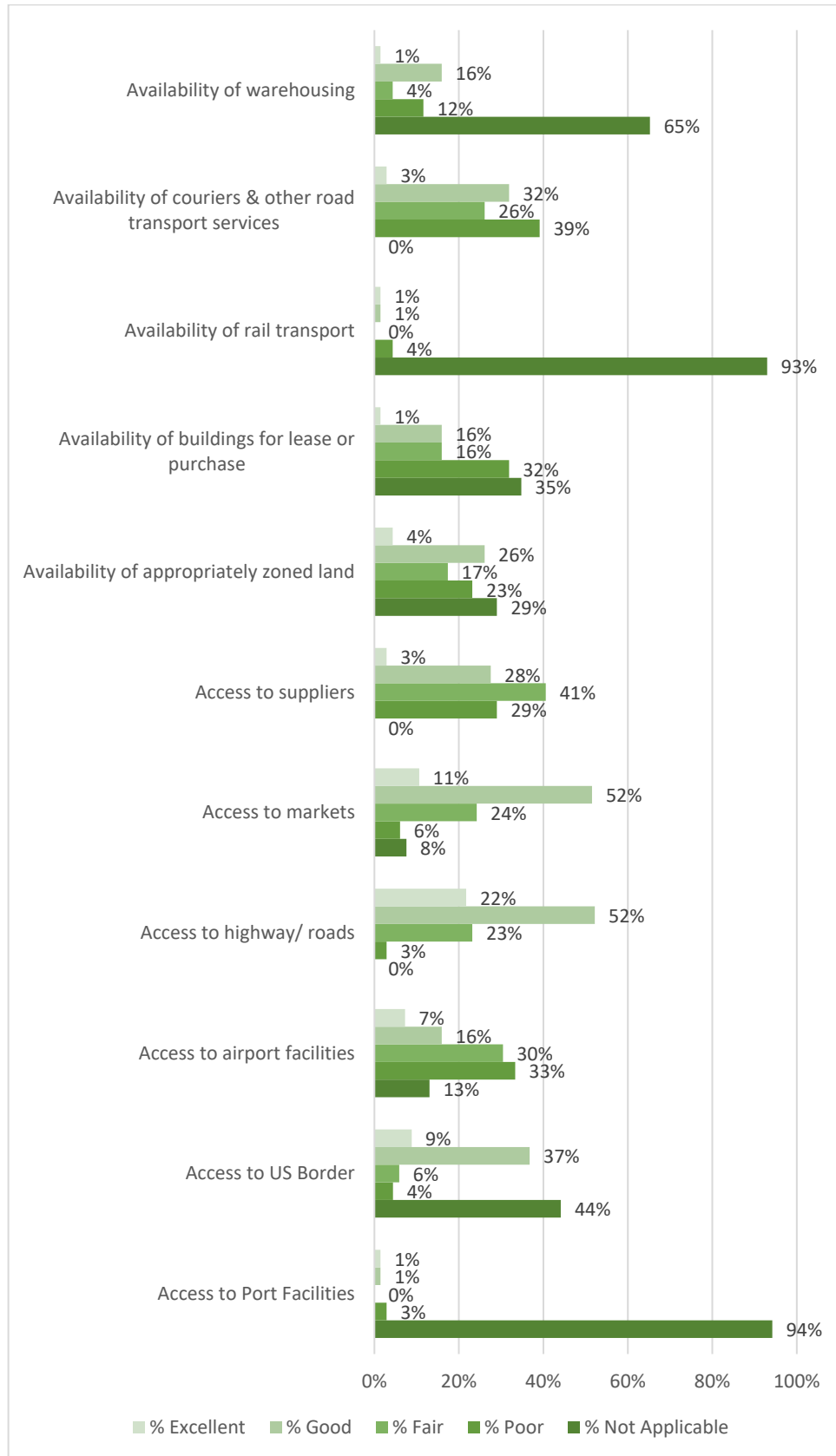
39% of respondents (27 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

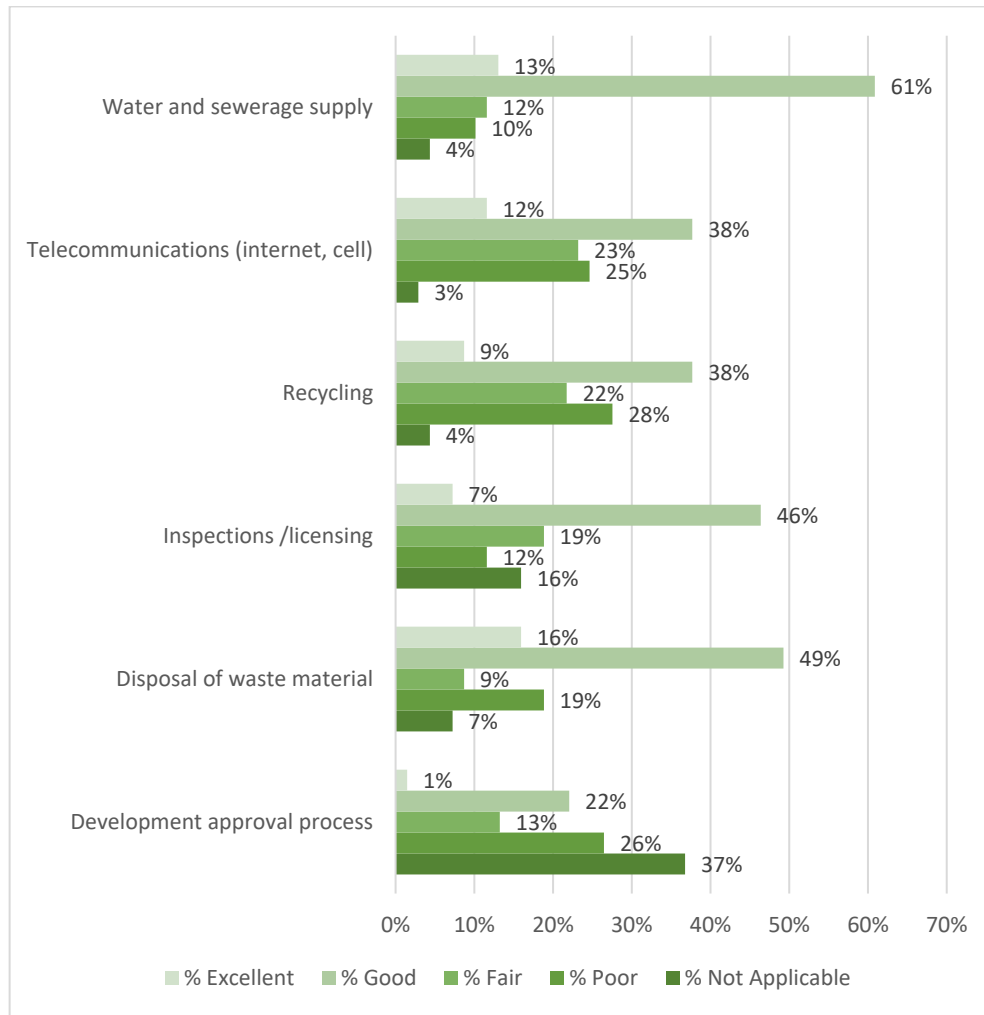
Government Services

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 availability of couriers and other road transport services (39% or 27 businesses), access to airport facilities (33% or 23 businesses), and availability of buildings for lease or purchase (32% or 22 businesses).
- The services that received the highest number of **FAIR** ratings were access to suppliers (41% or 28 businesses), access to airport facilities (30% or 21 businesses), and availability of couriers and other road transport services (26% or 18 businesses).
- The services that received the highest number of **GOOD** ratings were water and sewerage supply (61% or 42 businesses), access to highway/roads (52% or 36 businesses) and access to markets (52% or 34 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to highway/roads (22% or 15 businesses), disposal of waste material (16% or 11 businesses), and water and sewerage supply (13% or 9 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (94% or 65 businesses), availability of rail transport (93% or 63 businesses) and the availability of warehousing (65% or 45 businesses).

Figure 74: Rating of government services. Note: # of respondents varies





When asked whether there were any suggestions on how to improve any of the services and infrastructure, 78% of respondents (54 businesses) indicated they had suggestions. The highest number of respondents (19% or 15 businesses) discussed improvements to the recycling, composting and waste management systems, along with improvements to streamline the development approval process (12% or 9 businesses).

Figure 75: Key words and responses in respondents' suggestions for improvements to government services



"Windermere businesses struggle with highway access and exits."

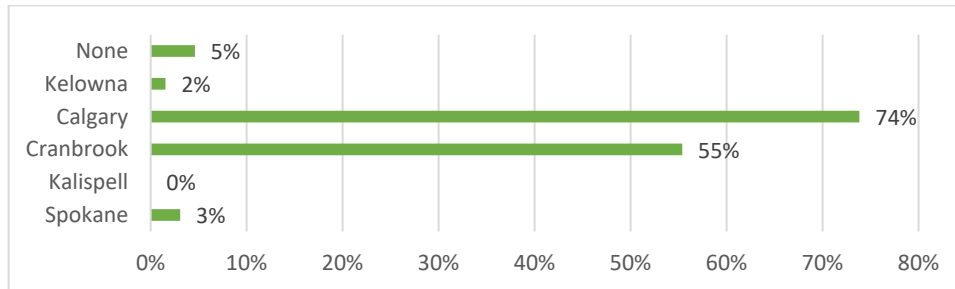
"Zoning changes in favour of industry and commercial use is a necessity in order to not only grow my business, but also grow the local economy."

"Better recycling process for building."

Airport Service

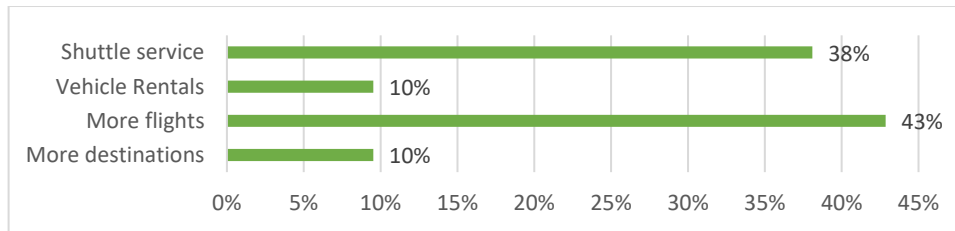
The Calgary International Airport is the most used airport, with 74% of respondents (48 businesses) indicating they use that airport. The Canadian Rockies International Airport (Cranbrook) was the second most used with 55% (36 businesses).

Figure 76: Airport service used. Note: 65 respondents



Respondents indicated that they would like more flights (43% or 9 businesses) and a shuttle service (38% or 8 businesses) at the local airport.

Figure 77: New services at local airport. Note: 21 respondents

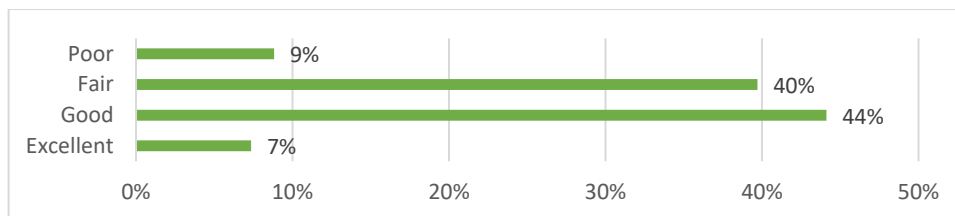


Business Climate

Quality of Business Climate

The majority of responses rated the overall business climate as good (44% or 30 businesses).

Figure 78: Rating of local business climate. Note: 68 respondents

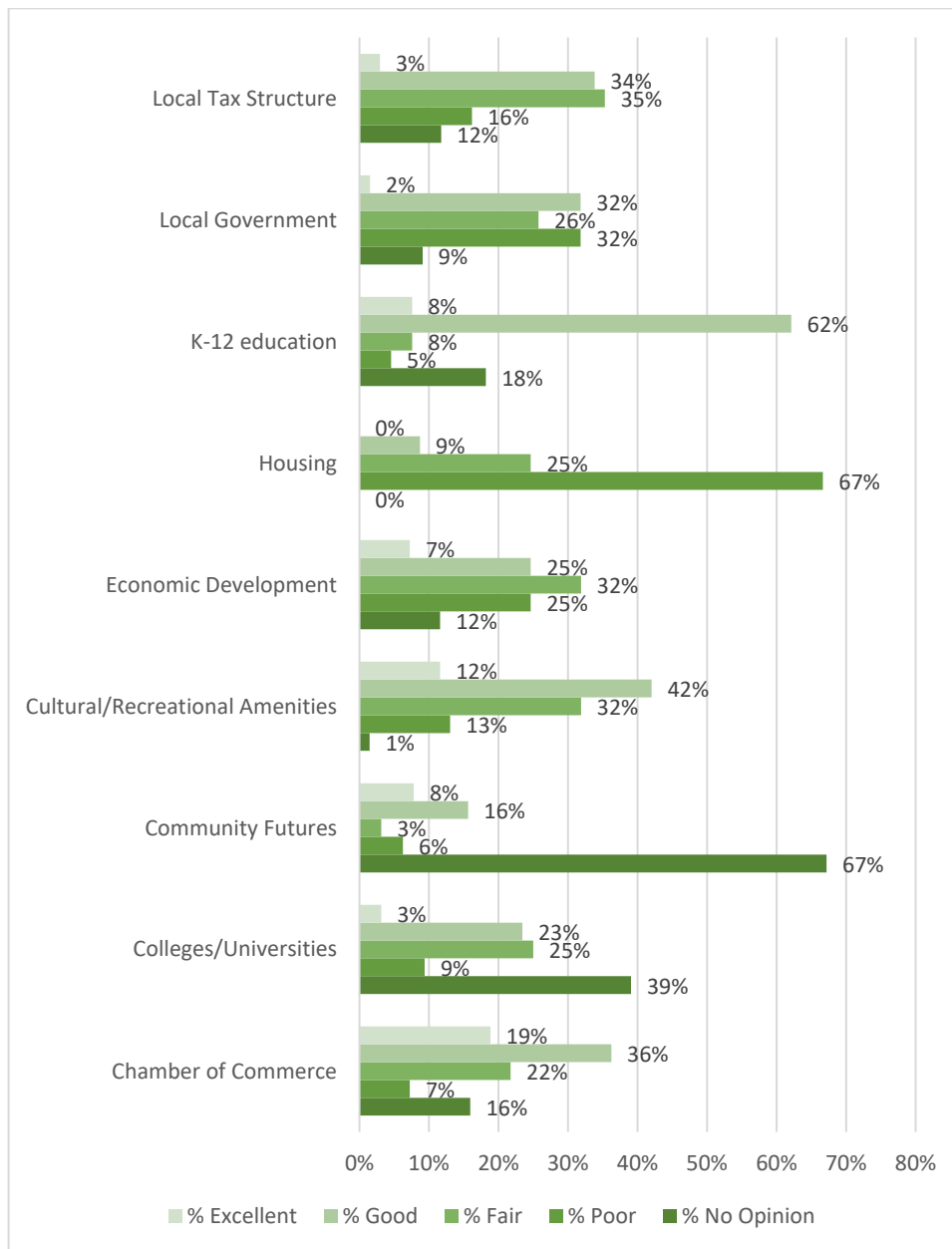


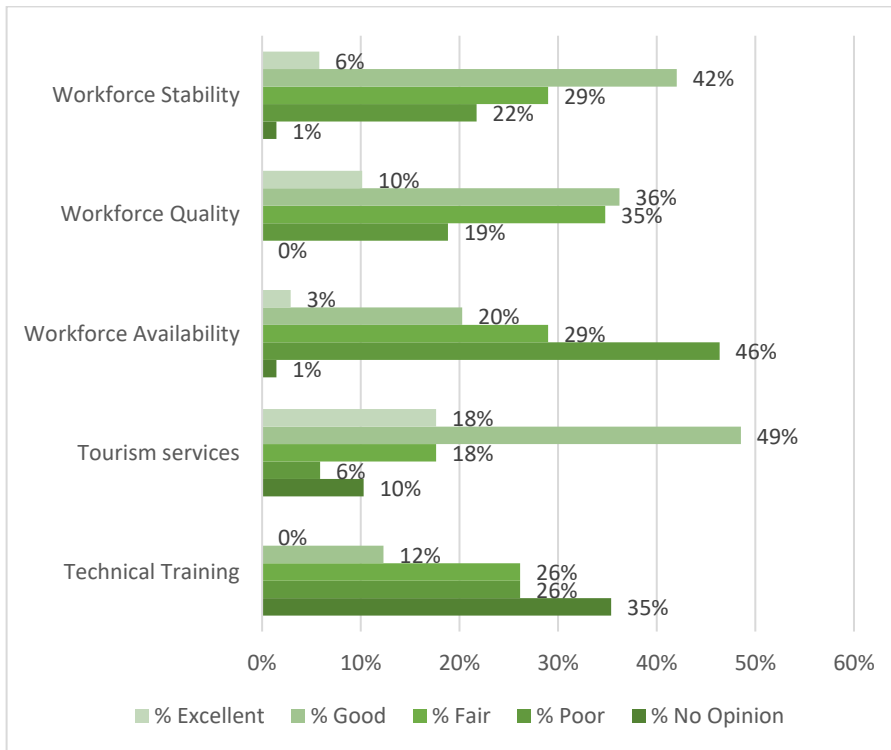
Respondents rated the quality of a list of specific business climate factors as either poor, fair, good, excellent or not applicable to their business.

- The factors that received the highest number of **POOR** ratings included housing (67% or 46 businesses), workforce availability (46% or 32 businesses), and local government (32% or 21 businesses).
- The factors that received the highest number of **FAIR** ratings included workforce quality (35% or 24 businesses), economic development (32% or 22 businesses), and cultural/recreational amenities (32% or 22 businesses).

- The factors that received the highest number of **GOOD** ratings included K-12 education (62% or 41 businesses), tourism services (49% and 33 businesses), and cultural/recreational amenities and workforce stability (42% or 29 businesses each).
- The factors that received the highest number of **EXCELLENT** ratings included chamber of commerce (19% or 13 businesses), tourism services (18% or 12 businesses), and cultural and recreational amenities (12% or 8 businesses).
- The factors that received the highest number of **NO OPINION** ratings include Community Futures (67% or 43 businesses), Colleges/Universities (39% or 25 businesses), and Technical Training (35% or 23 businesses).

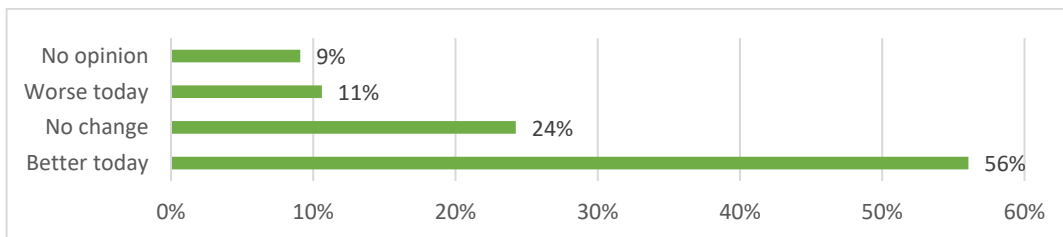
Figure 79: Rating of business climate factors. Note: # of respondents varies





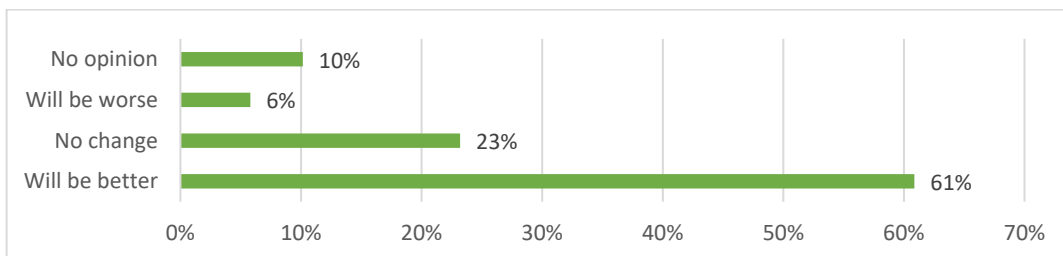
56% of respondents (40 businesses) felt that the business climate is better today than it was 5 years ago. 11% (7 businesses) thought that it is worse, and 24% (16 businesses) believed there was no change in the business climate.

Figure 80: Business climate today vs. 5 years ago. Note: 66 respondents



61% of respondents (42 businesses) expect that the business climate will be better 5 years from today. 6% (4 businesses) expect that it will be worse.

Figure 81: Business climate 5 years from today. Note: 69 respondents

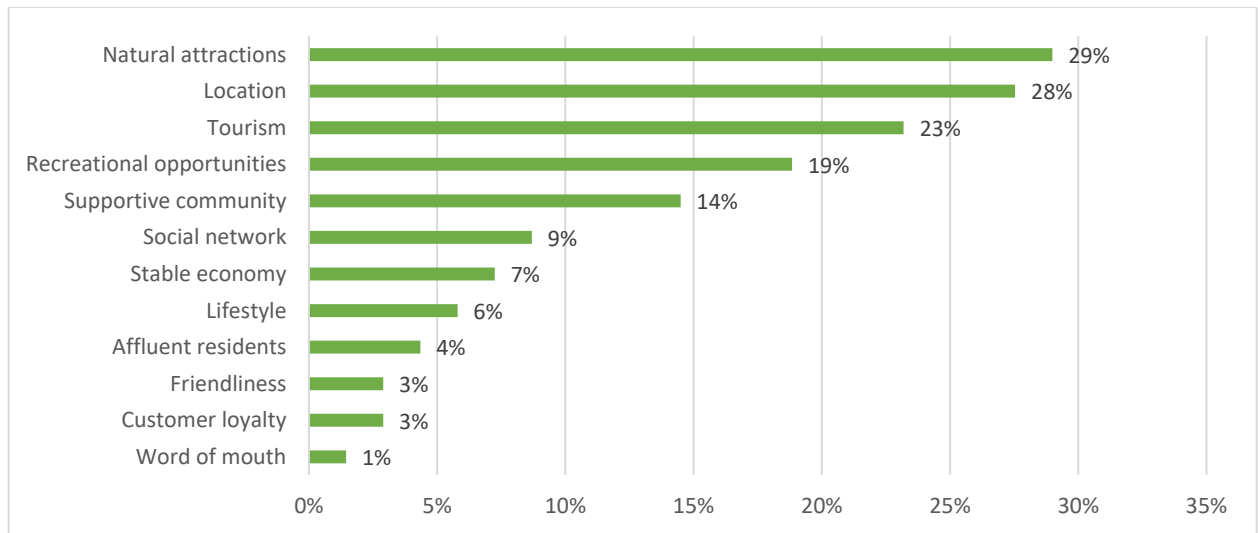


Strengths and Weaknesses of Business Climate

When respondents were asked to list the community's strengths as a place to do business, the highest number of responses (29% or 20 responses) cited the natural attractions, 28% (19

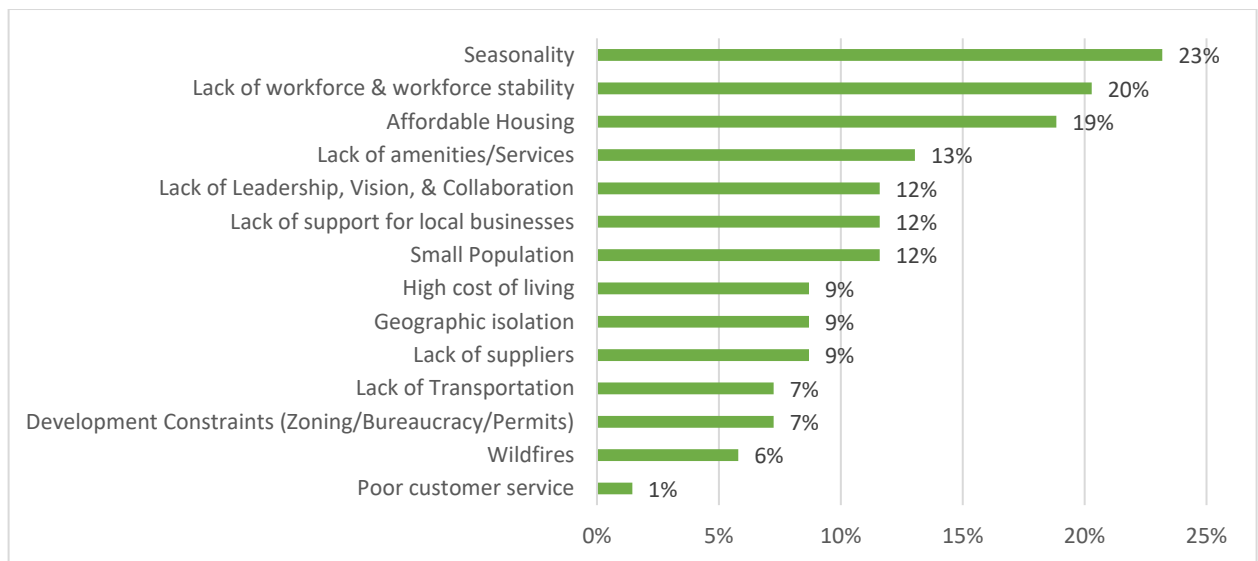
businesses) indicated that the location was an important factor and 23% (16 businesses) indicated that tourism contributed.

Figure 82: Community's strengths as a place to do business. Note: 68 respondents



Respondents were asked to list the community's weaknesses as a place to do business. The highest number of responses (23% or 16 respondents) related to the seasonality of the community. The lack of workforce and workforce stability was cited by 20% (14 businesses), as was affordable housing (19% or 13 businesses).

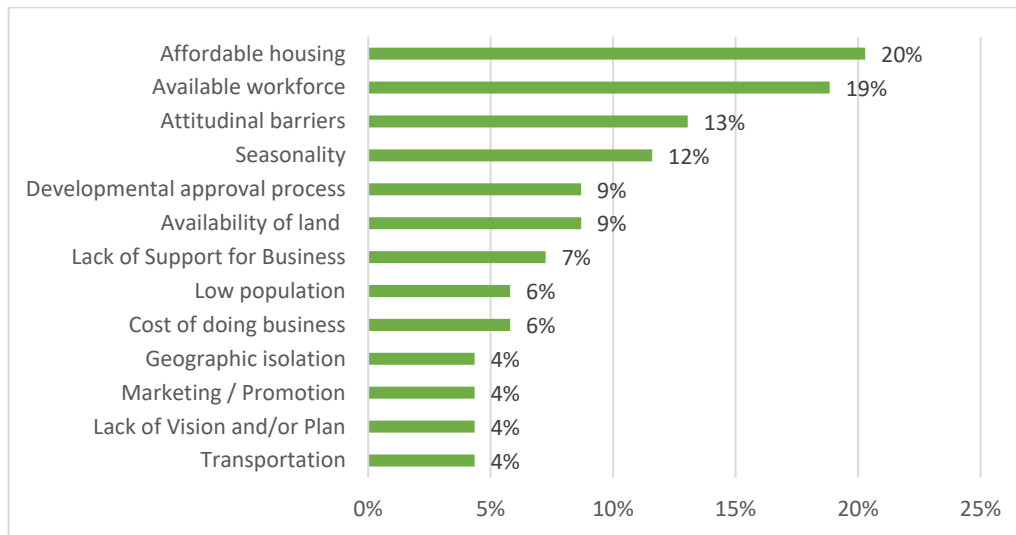
Figure 83: Community's weaknesses as a place to do business. Note: 68 respondents



Business Growth

84% of respondents (58 businesses) indicated that there are barriers to growth. The highest number of respondents (20% or 14 businesses) stated that affordable housing is an important barrier to growing the community's economy. Other commonly cited barriers include workforce availability (19% or 13 businesses), attitudinal barriers (13% or 9 businesses), and the seasonality of communities (12% or 8 businesses).

Figure 84: Barriers to growth in the community. Note: 58 respondents



The following excerpts illustrate the barriers discussed:

“Too seasonal nature of doing business in the valley!”

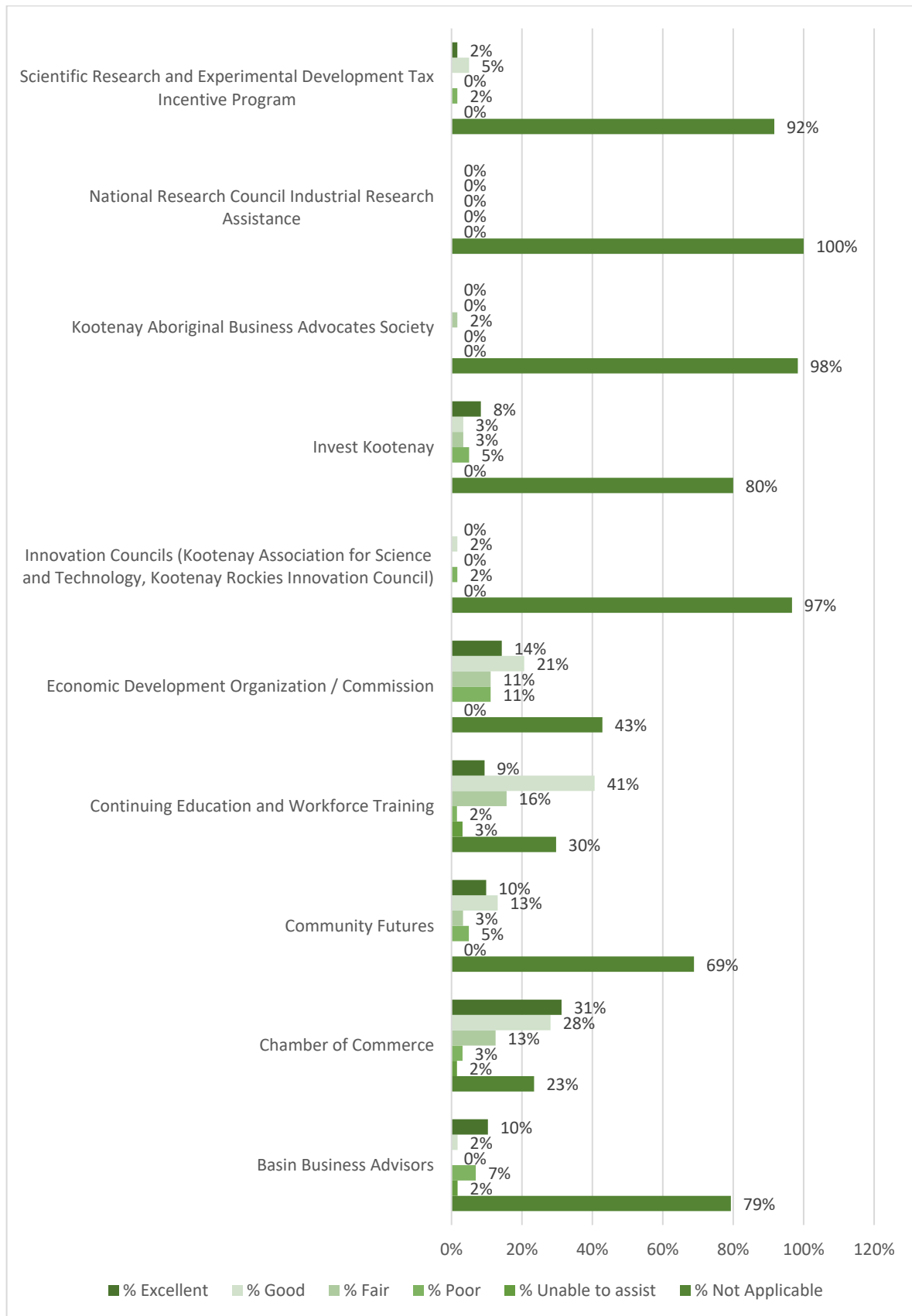
“Housing shortage, labour shortage.”

“Housing is a barrier to stable growth.”

“The current mindset of the municipality holds the community back from growth.”

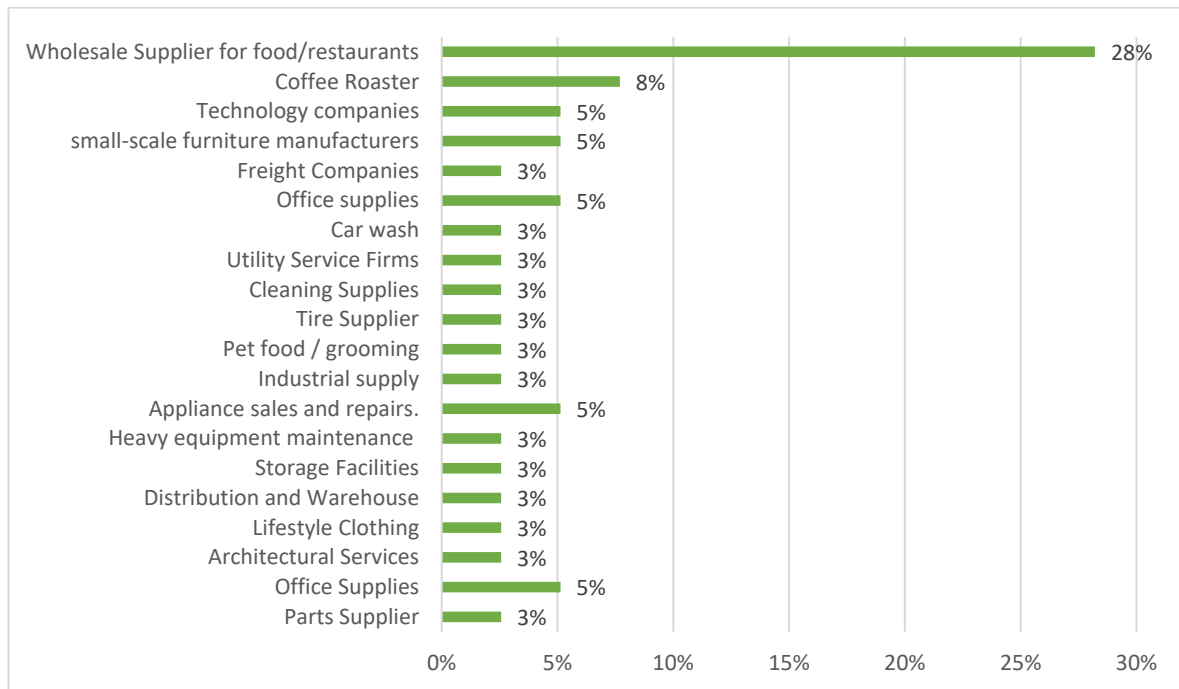
Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce was cited as providing an excellent level of service by 31% of respondents (20 businesses) and a good level of service by 28% of respondents (18 businesses). While the Economic Development Organisation/Commission received the highest Poor response (11% or 7 businesses), it was also rated as excellent and/or good by 35% (22 businesses) of respondents.

Figure 85: Level of service from business support providers. Note: # of respondents varies



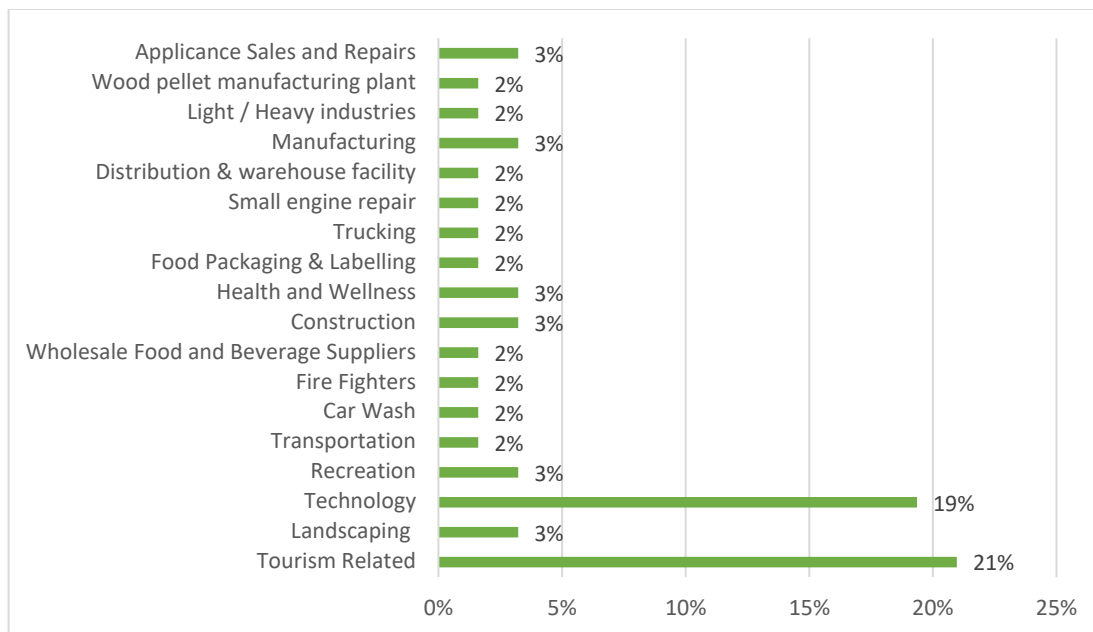
64% of respondents (44 businesses) indicated that there are suppliers that could locate in the region. Wholesale suppliers for food and restaurants was the most common recommendation (28% or 11 businesses).

Figure 86: Potential Suppliers. Note: 40 respondents



When asked what business, sector or industry could be attracted to most strategically benefit the industry, the most common response was tourism (21% or 13 respondents) followed by technology (19% or 12 businesses).

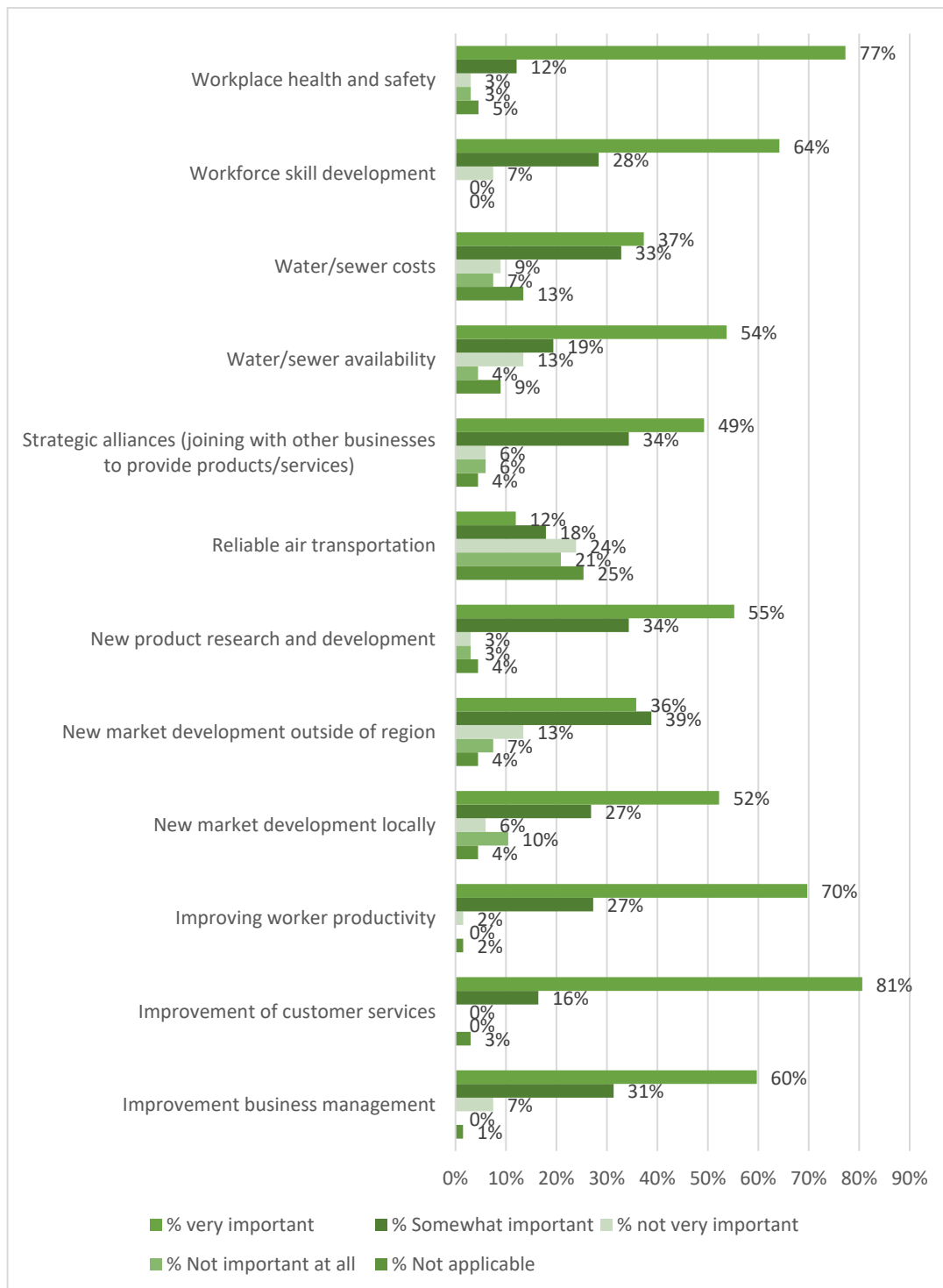
Figure 87: Sectors, businesses or industries that could be attracted to region. Note: 62 respondents

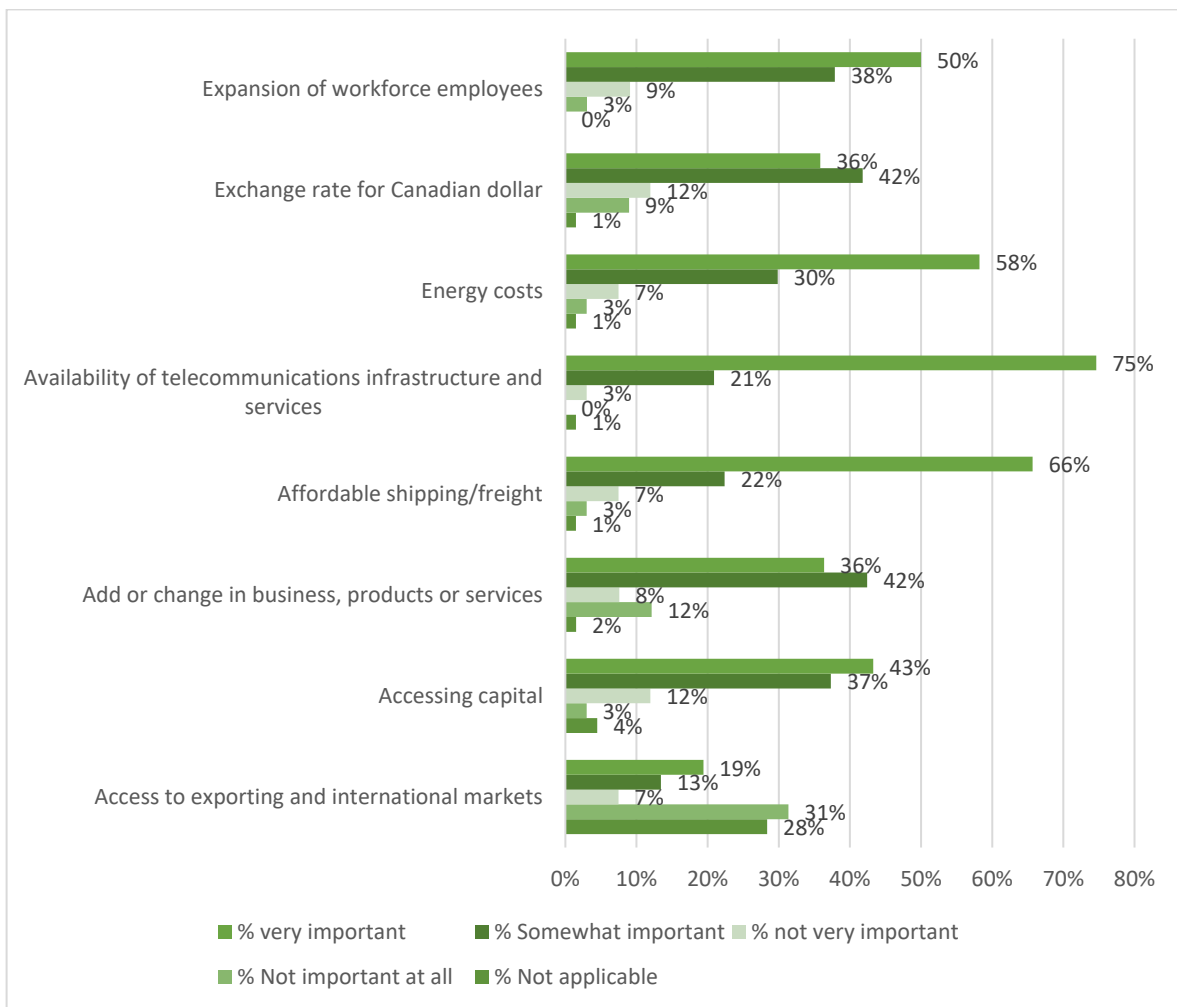


Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. The factors that received the highest number of very important ratings include improvement of customer service (81% or 54 businesses) and workplace health and safety (77% or 51 businesses).

Figure 88: Importance of business competitiveness factors. Note: # of respondents varies

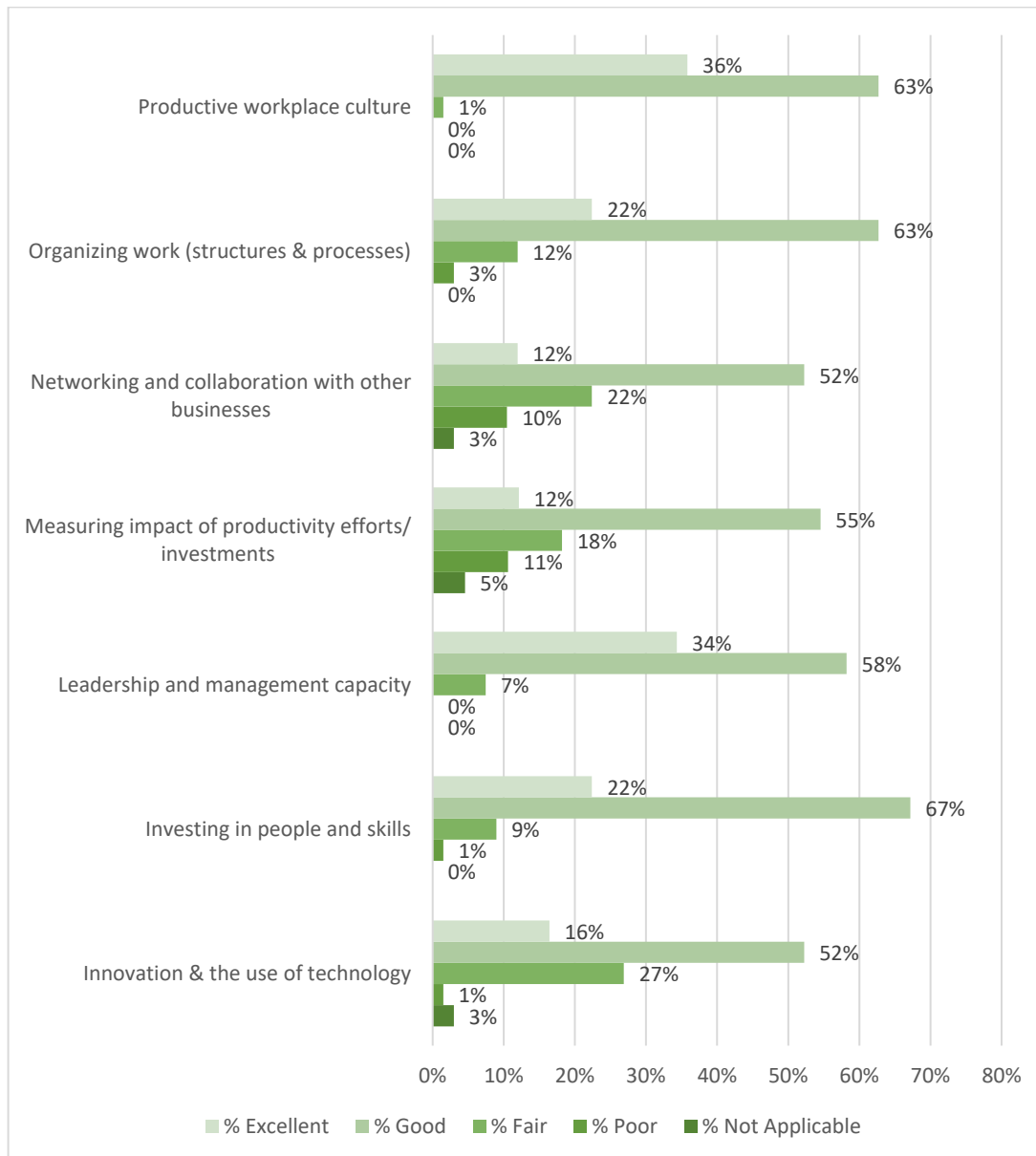




When asked to rate their business' performance on a list of productivity drivers, the drivers that received the highest number of:

- **EXCELLENT** ratings include productive workplace culture (36% or 24 businesses) and leadership and management capacity (34% or 23 businesses);
- **GOOD** ratings include investing in people and skills (67% or 45 businesses), productive workplace culture (63% or 42 businesses), and organizing work (structures and processes) (63% or 42 businesses);
- **FAIR** ratings include innovation and the use of technology (27% or 18 businesses);
- **POOR** ratings include measuring impact of productivity efforts/investments and networking and collaboration with other businesses (11% or 7 businesses, respectively).

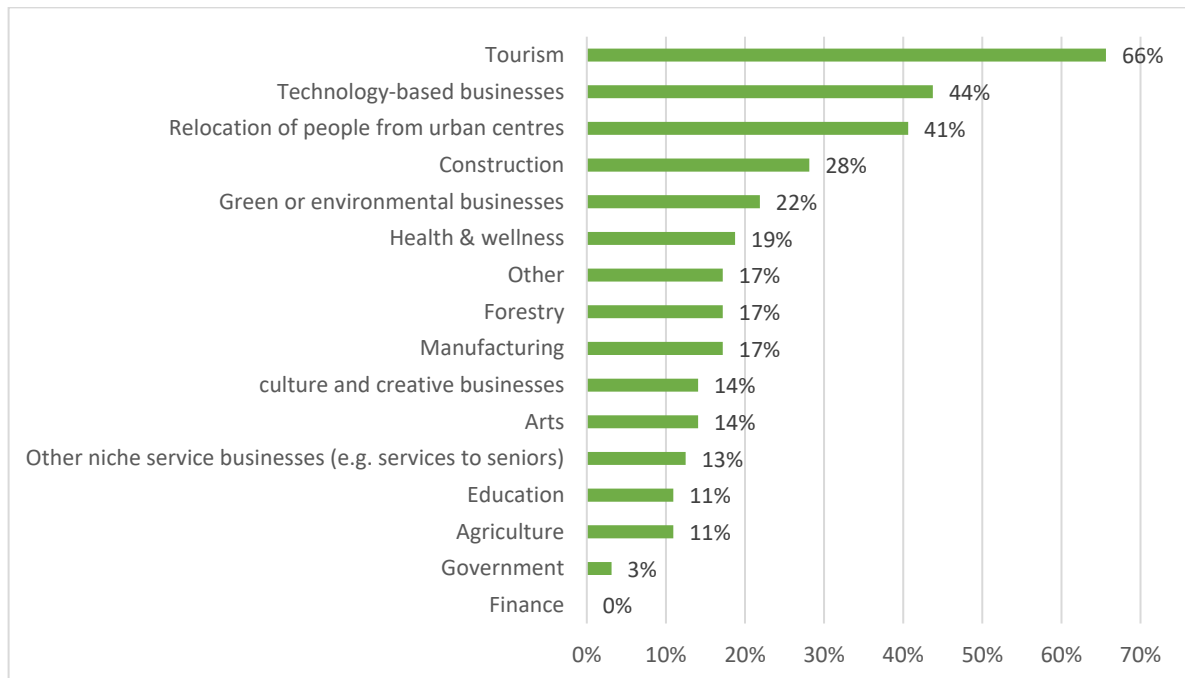
Figure 89: Performance on key productivity drivers. Note: # of respondents varies



Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (66% or 42 businesses), technology-based businesses (44% or 28 businesses), and relocation of people from urban centres (41% or 26 businesses). For a list of drivers identified as “other”, refer to Appendix A.

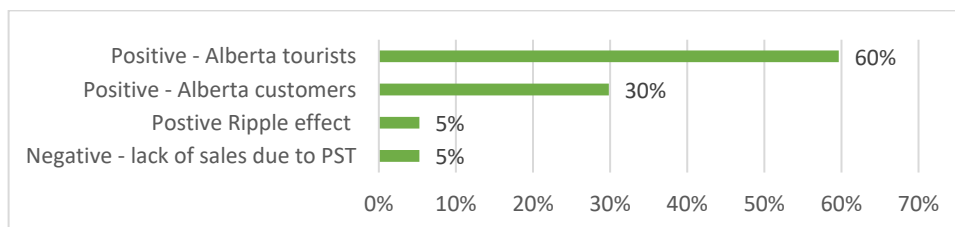
Figure 90: Economic drivers with greatest growth potential. Note: 64 respondents



Proximity to Alberta

64 respondents (95%) reported that they were influenced by their proximity to Alberta. The positive impact of Alberta tourists was noted by 60% of respondents (34 businesses), while an additional 30% (17 businesses) indicated a similar positive impact of customers from Alberta.

Figure 91: Impact of Proximity to Alberta. Note: 61 respondents

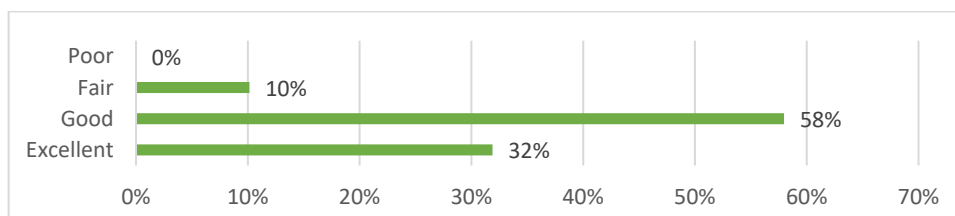


Assessment and Plans

Overall Health

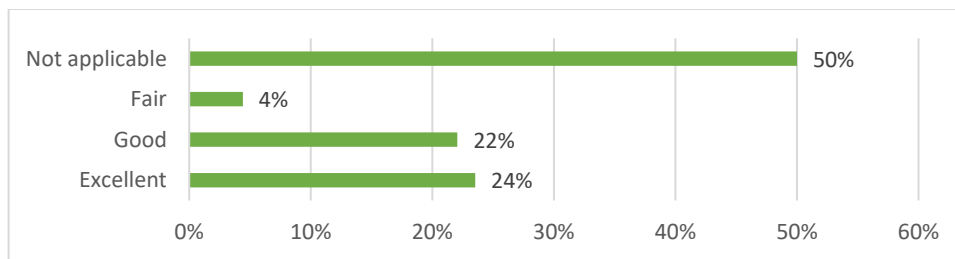
The majority of businesses surveyed reported that their company is in overall good health (58% or 40 businesses), 32% (22 businesses) reported that their company's health is in excellent condition and 10% (7 business) reported that it is fair. No businesses indicated that their company is in poor health.

Figure 92: Company's overall health. Note: 69 respondents



Most businesses with a parent company indicated that the health of that parent company is excellent (24% or 16 businesses).

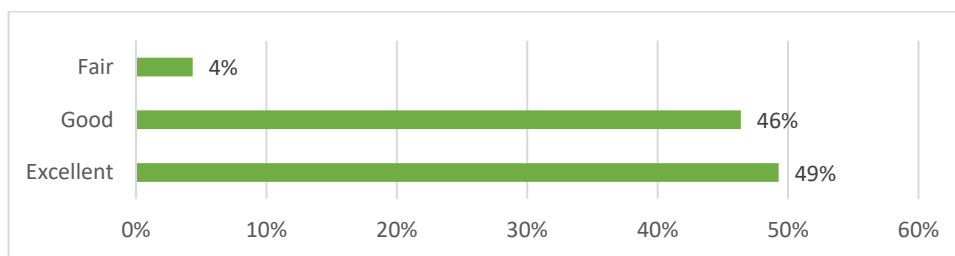
Figure 93: Overall health of parent company. Note: 68 respondents



Attitude toward Community

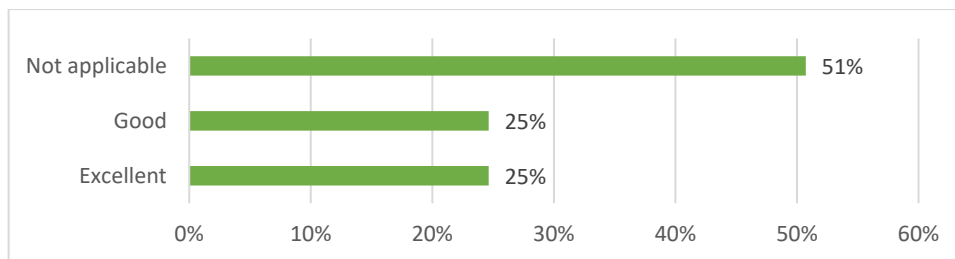
49% of respondents (34 businesses) indicated that their local management's attitude toward the community is excellent and 46% (32 businesses) indicated that it is good.

Figure 94: Local management's attitude toward community. Note: 69 respondents



Respondents indicated that their parent company's attitude toward the local community is either excellent (25% or 17 businesses) or good (25% or 17 businesses).

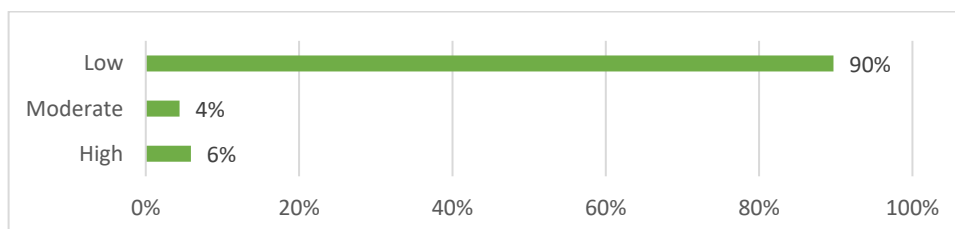
Figure 95: Parent company's attitude toward local community. Note: 69 respondents



Risk of Closing or Downsizing

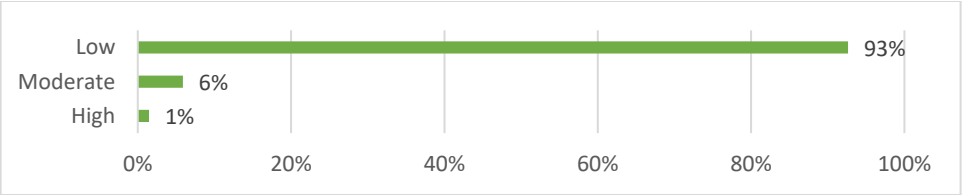
Data indicates that the risk of businesses in the Columbia Valley closing is generally low, with 90% (61 businesses) citing a low risk.

Figure 96: Risk of facility closing. Note: 68 respondents



Similarly, the data indicates that the risk of downsizing is low, with just 1% (1 business) indicating that the risk is high.

Figure 97: Risk of facility downsizing. Note: 68 respondents



RECOMMENDATIONS

Next Steps

The results of this survey can be used by economic development organizations in the Columbia Valley to inform short- and long-term business retention and expansion action planning. Many BRE programs ensure that follow-up actions occur as soon as possible following completion of the survey stage. This approach builds credibility, a sense of success and momentum to carry out long-term actions.

Successful BRE programs pick an initial set of short-term actions that:

- can be completed in 6 months or less;
- are highly visible to businesses and the community as a whole; and
- have the potential for considerable impact with minimal input (i.e., the “low hanging fruit”).

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.

BRE results can form the backbone of a community’s economic development strategy and, in some cases they are integrated into the community’s Official Community Plan (OCP).

Some communities form committees or action groups around the themes or action areas identified in the BRE report to ensure success in implementation.

The following steps could further support links to planning and action:

1. Continually communicate (through press, presentations, web/social media, etc.) with the business community regarding actions and be clear that the actions are tied to the BRE process.
2. Establish a task force or committee to continue building on the momentum of the BRE report and ensure actions and next steps are taken and kept on track. Include follow-up discussions with individual businesses (particularly to address red and green-flags). Consider using the “Business Walk” survey as a tool to connect with businesses annually.
3. Host a business stakeholder forum to present findings, discuss common issues and potential solutions.
4. Host a facilitated action planning session with economic development stakeholders and industry representatives.
5. Based on results from the forums and action planning session, finalize priority actions, develop related action plans, update existing economic development plans and develop relationships with a broader network of support providers (at regional, provincial and national scales) to support implementation.
6. Establish a monitoring program to assess the impact of implementation efforts.

Potential Action Areas

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 1,768 employees. The majority (61%) of employees are full-time, followed by 23% temporary, and 16% part-time. The size of the workforce appears to be increasing, with 48% of businesses indicating that the number of employees at their business has been increasing, and 39% indicating that the number has stayed the same. Employment trends are also expected to remain stable or increase, with the majority of businesses expecting the number of casual staff to stay the same, while the number of full time and part time employees is expected to increase. The majority of businesses (87%) recruit locally. 76% of businesses indicate that they currently face recruitment challenges, 70% anticipate future difficulties, and 64% of businesses stated that there were strategies that could address recruitment. Additionally, 15 respondents noted that the lack of skilled staff was posing a barrier to expansion plans.

Respondents most commonly rely on social media and other internet sources (33%) to recruit employees, with general advertising (29%) also often used, followed by word of mouth (18%), and employment centres (13%). Actions identified by respondents that could prove helpful include providing access to affordable housing, as well as providing training and educational opportunities. The hospitality and food/beverage service industries featured in areas of future recruitment challenges, as did the area of administrative/clerical and sales/service. Targeted actions that focus on the tourism and food and beverage sectors specifically could be considered. Related to recruitment and retention are a number of identified critical considerations for employees which include housing and the cost of living.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with 17% of essential employees under the age of 25. Increasing youth employment may assist in addressing the recruitment challenges that 76% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for low youth employment, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), hosting career and employer information fairs, and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

57% of businesses in the region report being in a growth cycle and 28% are maturing. The majority of businesses are anticipating low to moderate sales growth over the next year, with 39% expecting moderate sales growth between 1 – 9% and 46% expecting 10-24% sales growth. The majority of businesses (59%) indicate that the majority of their sales are to local markets. 68% indicate that they are planning to expand within the next three years, and the majority (80%) indicate that their existing site is adequate. Businesses also report that employment rates are stable, and that they anticipate increases in part time and full time staff over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive, stable report on local business conditions. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Support could come in the form of assistance with navigating local regulations, identifying and securing new sites if appropriate, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to

expansion which include financing, lack of skilled staff, and local regulations. It is worth noting that very few (33%) 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.

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be medium in size (28% have between 5 and 9 employees, 43% are located in a facility that is between 1,000 sq. ft. and 4,999 sq.ft., and 39% have annual sales under between \$1 million and \$4.9 million) and independent (just 21% have other locations). The customer base for businesses appears to be diverse, with 47% of businesses indicating that just 1 - 9% of their sales are generated by their top three customers. It is interesting to note that the majority of employees are full-time (61%). Tailoring supports and services to small/medium sized, independent businesses that are focused on the service and tourism sectors will benefit businesses in the Columbia Valley. Services and supports should consider that 40% of functions provided by a business are 'services'. Actions to support and encourage small and medium sized businesses could include specific training targeted to the needs of small businesses, for example providing shared services such as payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include exploring existing supports available from agencies such as the provincial Small Business BC organisation, go2HR, Destination BC, Kootenay Rockies Tourism, CBT's Basin Business Advisors Program, or the Kootenay and Boundary Farm Advisors program.

Supply Sourcing and Procurement

The data indicates that 48% of supplies come from within the local region. The most common response (51%) for the reason why supplies are sourced outside of the local area is that they are not available locally. Interestingly, 58% of respondents indicated that they supply services or products to companies in the community. By far the most common suggestion for a new supplier in the area was for a wholesale supplier for the food and beverage sector. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area businesses could also be explored. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Local businesses do not appear to engage actively with government procurement processes, with only 9% 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, promotion on relevant websites, and social media channels.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 66% of businesses *do* have a training budget and 52% indicated that training typically occurs locally. 19% of respondents indicated that the lack of skilled staff was a barrier to their expansion plans. 50% of businesses were aware of new trends,

technologies and industry changes that will require new skills. Additionally, 75% identified specific areas for training/professional development, including industry specific training, first aid, tourism/hospitality, management, sales, and food safe. There is a preference for online/webinar (35%) or classroom (34%) style formats. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with local 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, yet only 20% of respondents indicated that they have a formal succession plan and under half (46%) have an up-to-date business plan. 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, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future business 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.

Continued Support for Tourism Sector

The Columbia Valley is already invested in the tourism sector with a relatively high percentage (48%) of businesses engaged in tourism related industries (14% in the 'Retail and Wholesale Trade' sector, 28% in the 'Accommodation and Food Services' sector, and 6% in the 'Arts, Entertainment and Recreation' sector). The majority of respondents (66%) indicated that tourism was the economic driver with the greatest growth potential. Respondents also noted that increasing the number of tourism related businesses, followed by technology would benefit the region. Actions to increase and continue the support for the tourism industry could include the continued collaboration between government and local tourism agencies such as Destination British Columbia, Chambers of Commerce, and local businesses. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Addressing Seasonality

The seasonality of the community was identified by 23% of respondents (16 businesses) when asked about weaknesses of the community as a place to do business. Seasonality was also referenced by 8 respondents (12%) as a barrier to growth. A number of businesses referenced the need to expand the tourism season and encourage tourism during the entire year. Action in this area may include reviewing marketing initiatives, engaging with tourism operators to discuss barriers and opportunities to decrease the seasonality challenge, and engage with groups like Kootenay Rockies Tourism and Destination BC to explore options to change this characteristic.

APPENDIX A: DATA TABLES

Company Information

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Agriculture, forestry, fishing and hunting	11	1	1%
Mining, quarrying, and oil and gas extraction	21	1	1%
Construction	23	7	10%
Manufacturing	31-33	8	12%
Retail and Wholesale Trade	41-45	10	14%
Information and Cultural Industries	51	1	1%
Finance and Insurance	52	2	3%
Real Estate and Rental and Leasing	53	4	6%
Professional, Scientific and Technical Services	54	3	4%
Administrative Support, Waste Management and Remediation	56	5	7%
Educational Services	61	0	0%
Health Care and Social Assistance	62	0	0%
Arts, Entertainment and Recreation	71	4	6%
Accommodation and Food Services	72	19	28%
Other Services	81	4	6%
Total		69	100%

Survey Participants: 69

Question Respondents: 69

No Response Count: 0

Response Rate: 100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Engineering/RD	7	5%
Distribution	23	15%
Warehousing	15	10%
Manufacturing	17	11%
Headquarters	28	19%
Services	61	40%

Total	151	

Survey Participants: 69
Question Respondents: 69
No Response Count: 0
Response Rate: 100%

Figure 3: Who are your competitors? Where are your competitors located?	Count	Percent of Question Respondents
Outside Canada	4	5%
In Province	13	16%
In Canada	14	17%
In Region	52	63%
Total	83	

Survey Participants: 69
Question Respondents: 64
No Response Count: 5
Response Rate: 93%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Competitive pricing	2	2%
proximity to natural resources	2	2%
Innovation	1	1%
Lack of Competition	9	8%
Location	22	19%
Diversified product / services	3	3%
Experience	2	2%
Lifestyle	5	4%
Natural resources	2	2%
Networking	2	2%
Niche market	4	3%
Reputation	8	7%
Niche product	4	3%
Community support	5	4%
Customer Service	4	3%
Demand for products and services	2	2%
Workforce	25	22%
Quality product / service	13	11%

Total	115	
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Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 5: Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Business expansion	1	1%
Established business	1	1%
Experience in the business	2	2%
Hobby turned into a business	0	0%
Connections to the community	0	0%
Already living here	6	7%
Close to family	2	2%
Location	27	30%
Born and raised here	5	6%
Bought an existing business	17	19%
Business opportunity	20	22%
Lifestyle	9	10%
Total	90	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 6: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	14	20%
No	55	80%
Total	69	100%

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 7: Does this company have another location elsewhere? If Yes, where?	Count	Percent of Question Respondents
Outside Canada	2	10%
Elsewhere in nation	6	30%
In Province	12	60%
Total	20	

Survey Participants:	69
Question Respondents:	14
No Response Count:	55
Parent Question 'Yes' Respondents:	14
Parent Question Respondents:	69

Figure 8: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	0	0%
Elsewhere in Canada	4	8%
In Province	47	92%
Total	51	

Survey Participants:	69
Question Respondents:	51
No Response Count:	18
Response Rate:	74%

Figure 9: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	4	6%
Emerging	7	10%
Growing	39	57%
Maturing	19	28%
Total	69	

Survey Participants:	69
Question Respondents:	69
No Response Count:	0
Response Rate:	100%

Figure 10: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	2	3%
1-4 Years	9	13%
5-9 Years	10	14%
10-19 Years	21	30%
>20 Years	27	39%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 11: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	3	4%
Privately owned	65	96%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 11b: What is this company's legal status?	Count	Percent of Question Respondents
Limited liability partnership (LLP)	2	3%
Partnership	3	4%
Non-profit	2	3%
Sole proprietorship	6	9%
Corporation	55	80%
Other	1	1%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 12: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	20	29%
No	49	71%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 12b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Neutral	4	21%
Negative	1	5%
Positive	14	74%
Total	19	

Survey Participants: 69
 Question Respondents: 19
 No Response Count: 50
 Parent Question 'Yes' Respondents: 20
 Parent Question Respondents: 68

Figure 12c: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	11	16%
No	56	84%
Total	67	

Survey Participants: 69
 Question Respondents: 67
 No Response Count: 2
 Response Rate: 97%

Figure 13: If Yes what is the anticipated time frame	Count	Percent of Question Respondents
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1 year or less	3	33%
2 years	2	22%
3 years or more	4	44%
Total	9	

Survey Participants:	69
Question Respondents:	9
No Response Count:	60
Parent Question 'Yes' Respondents:	11
Parent Question Respondents:	67
Response Rate:	82%

Figure 14: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Sell/transfer to a family member	2	25%
Sell to another company	1	13%
Sell/transfer to a non-family member	5	63%
Other	0	0%
Total	8	

Survey Participants:	69
Question Respondents:	8
No Response Count:	61
Parent Question 'Yes' Respondents:	11
Parent Question Respondents:	67
Response Rate:	73%

Figure 15: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	14	20%
No	55	80%
Not applicable	0	0%
Total	69	

Survey Participants:	69
Question Respondents:	69
No Response Count:	0
Response Rate:	100%

Figure 15b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	20	29%
No	49	71%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 15c: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	11	79%
No	3	21%
Total	14	

Survey Participants: 69
 Question Respondents: 14
 No Response Count: 55
 Parent Question 'Yes' Respondents: 20
 Parent Question Respondents: 69

Figure 16: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	32	46%
No	37	54%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Local Workforce

Figure 17: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	10	14%
5-9	19	28%

10-19	18	26%
20-49	16	23%
50-99	3	4%
Greater than 100	3	4%
Total	69	

Total employees: 1,768

Survey Participants: 69

Question Respondents: 69

No Response Count: 0

Figure 18: Nature of Employment	Count	Percent of Question Respondents
Full Time	1085	61%
Part Time	279	16%
Temporary	404	23%
Total	1768	

Survey Participants: 69

Question Respondents: 69

Response Rate: 100%

Figure 19: Historical employment trend	Count	Percent of Question Respondents
Declining	8	12%
Staying the same	26	39%
Increasing	32	48%
No Response	3	

Total 69

Survey Participants: 69

Question Respondents: 66

No Response Count: 3

Figure 20: How did the number of staff change, if at all, in the last 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	26	40%
Stayed the same	26	40%
Decreased	13	20%
Total	65	

Survey Participants: 69
 Question Respondents: 65
 No Response Count: 4
 Response Rate: 94%

Figure 20b: How did the number of staff change, if at all, in the last 3 years?: Part-time	Count	Percent of Question Respondents
Increased	26	34%
Stayed the same	25	62%
Decreased	4	3%
Total	55	

Survey Participants: 69
 Question Respondents: 55
 No Response Count: 14
 Response Rate: 80%

Figure 20c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	4	25%
Stayed the same	10	63%
Decreased	2	13%
Total	16	

Survey Participants: 69
 Question Respondents: 16
 No Response Count: 53
 Response Rate: 23%

Figure 21: How do you expect the number of staff to change, if at all over the next 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	44	64%
Stayed the same	23	33%
Decreased	2	3%
Total	69	

Survey Participants: 69
 Question Respondents: 69

No Response Count: 0
 Response Rate: 100%

Figure 21b: How do you expect the number of staff to change, if at all over the next 3 years?: Part-time	Count	Percent of Question Respondents
Increased	30	50%
Stayed the same	27	45%
Decreased	3	5%
Total	60	

Survey Participants: 69
 Question Respondents: 60
 No Response Count: 9
 Response Rate: 87%

Figure 21c: How do you expect the number of staff to change, if at all over the next 3 years?: Casual	Count	Percent of Question Respondents
Increased	6	10%
Stayed the same	11	88%
Decreased	0	3%
Total	17	

Survey Participants: 69
 Question Respondents: 17
 No Response Count: 52
 Response Rate: 25%

Figure 22: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	12	17%
26 - 34	13	19%
35 - 49	32	46%
50 or older	12	17%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0

Response Rate: 100%

Figure 23: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
Lower than	3	5%
Same as	25	42%
Greater than	32	53%
Total	60	

Survey Participants: 69
Question Respondents: 60
No Response Count: 9
Response Rate: 87%

Figure 23b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
\$10-\$12.99	0	0%
\$13-\$14.99	0	0%
\$15-\$19.99	10	19%
\$20-\$29.99	22	42%
\$30-49.99	18	35%
\$50-\$99	2	4%
\$100 or more	0	0%
Total	52	

Survey Participants: 69
Question Respondents: 52
No Response Count: 17
Response Rate: 69%

Figure 23c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
\$10-\$12.99	0	0%
\$13-\$14.99	6	12%
\$15-\$19.99	25	50%
\$20-\$29.99	15	30%
\$30-49.99	4	8%
\$100 or more	0	0%
Total	50	

Survey Participants: 69

Question Respondents: 50
 No Response Count: 19
 Response Rate: 72%

Figure 23d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
\$10-\$12.99	4	9%
\$13-\$14.99	17	37%
\$15-\$19.99	18	39%
\$20-\$29.99	6	13%
\$30 or more	1	2%
Total	46	

Survey Participants: 69
 Question Respondents: 46
 No Response Count: 23
 Response Rate: 67%

Figure 24: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	40	63%
Decreasing	3	5%
Increasing	21	33%
Total	64	

Survey Participants: 69
 Question Respondents: 56
 No Response Count: 5
 Response Rate: 81%

Figure 25: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Internationally	1	1%
Nationally	5	7%
Provincially	3	4%
Locally	60	87%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 26: Recruitment and retention challenges	Count	Percent
Retention challenges	21	32%
Recruitment challenges	52	76%

Figure 26b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	22	32%
No	47	68%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 26c: Is the company experiencing recruitment problems with any employee positions or skills?	Count	Percent of Question Respondents
Yes	52	76%
No	16	24%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 27: If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.	Count	Percent of Question Respondents
Housing	10	8%
Training	12	10%
Support a positive environment	7	6%
Flex Time	14	12%
Bonuses	9	8%
Competitive wages	37	31%
Benefits	18	15%

None	12	10%
Total	119	

Survey Participants: 67

Question Respondents: 63

No Response Count: 4

Response Rate: 94%

Figure 28: If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
Benefits	2	2%
Employment Centre	16	13%
Social Media / Internet	40	33%
Job Fairs	3	3%
Recruiting Firms	2	2%
Word of mouth	22	18%
Advertising	35	29%
Total	120	
Survey Participants:	67	

Question Respondents: 62

No Response Count: 5

Response Rate: 93%

Figure 29: Is the company experiencing recruitment problems with any employee positions or skills? If Yes, in which category(s)?	Count	Percent of Question Respondents
Construction/Contractors	9	11%
Maintenance	4	5%
Mechanics	6	8%
Professional/Technical	6	8%
Food/Beverage Service	17	22%
Healthcare Professionals	1	1%
Administrative/Clerical	5	6%

Hospitality Service	13	16%
Other	18	23%
Total	79	

Survey Participants: 69
 Question Respondents: 52
 No Response Count: 17
 Parent Question 'Yes'
 Respondents:
 Parent Question
 Respondents:
 Response Rate: 75%

Figure 29b: Is the company experiencing recruitment problems with any employee positions or skills? Other (specify job roles/titles)	Count	Percent of Question Respondents
Mainly cooks and kitchen staff	1	8%
Especially cooks and kitchen staff	1	8%
Millwrights have to go to Vancouver (BCIT) or NAIT.	1	8%
Shift boss	1	8%
- Chartered professional accountant	1	8%
- Bakery / Pastry chef	1	8%
certified (master) restoration technician	1	8%
skilled landscapers / landscaping foreman	1	8%
kitchen staff especially has proven to be an issue.	1	8%
Technical Installers	1	8%
- qualified guides	1	8%
- part time housekeepers	1	8%
Zipline guides	1	8%
Total	12	

Survey Participants: 69
 Question Respondents: 12

No Response Count: 0
 Parent Question 'Other' Respondents: 18
 Parent Question Respondents: 52
 Response Rate: 67%

Figure 30: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	48	70%
No	21	30%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 30b: Do you anticipate future recruiting difficulties i.e. 3-5 year?: If Yes, in what area(s)?	Count	Percent of Question Respondents
Healthcare Professionals	1	1%
Maintenance	3	4%
Mechanics	5	7%
Sales/Service	7	10%
Administrative/Clerical	6	9%
Food/Beverage Service	18	26%
Hospitality Service	16	24%
Other	12	18%
Total	68	1

Survey Participants: 69
 Question Respondents: 48
 No Response Count: 21
 Parent Question 'Yes' Respondents: 48
 Parent Question Respondents: 69
 Response Rate: 100%

Figure 30c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)	Count	Percent of Question Respondents
trades men	1	14%
- Coffee Roasting - Packaging	1	14%
- Chartered professional accountant	1	14%
- Bakery / Pastry chef	1	14%
certified (master) restoration technician	1	14%
skilled landscapers / landscaping foreman	1	14%
Technical Installers	1	14%
Total	7	

Survey Participants: 69
 Question Respondents: 12
 No Response Count: 5
 Parent Question 'Other' Respondents: 12
 Parent Question Respondents: 48
 Response Rate: 100%

Figure 31: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	44	64%
No	25	36%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 31b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent of Question Respondents

childcare access and affordability	1	2%
transportation	6	13%
Employee Sharing	0	0%
Promote the area	5	11%
Provide training and education	6	13%
Support affordable housing	20	43%
Help with foreign worker program	4	9%
Better job advertising	4	9%
Total	46	

Survey Participants: 69

Question Respondents: 43

No Response Count: 26

Parent Question 'Yes' Respondents: 44

Parent Question Respondents: 69

Response Rate: 98%

Figure 32: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	31	46%
Semi-skilled	19	32%
Entry-level	16	29%

Figure 32b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	23	34%
25 to 49%	13	19%
50 to 74%	14	21%
75 to 100%	17	25%
Total	67	

Survey Participants: 69

Question Respondents: 67

No Response Count: 2
 Response Rate: 97%

Figure 32c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	22	37%
25 to 49%	18	31%
50 to 74%	12	20%
75 to 100%	7	12%
Total	59	

Survey Participants: 69
 Question Respondents: 59
 No Response Count: 10
 Response Rate: 86%

Figure 32d: Percent of workforce: Entry-level	Count	Percent of Question Respondents
less than 25%	29	52%
25 to 49%	11	20%
50 to 74%	8	14%
75 to 100%	8	14%
Total	56	

Survey Participants: 69
 Question Respondents: 56
 No Response Count: 13
 Response Rate: 81%

Figure 33: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	44	64%
No	25	36%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 33b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	66	96%
No	3	4%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 33c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	29	42%
No	40	58%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 34: Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?	Count	Percent of Question Respondents
Yes	34	50%
No	34	50%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 35: Are there any areas of training or professional development that would be of benefit to you or your employees?	Count	Percent of Question Respondents

Yes	52	75%
No	17	25%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 35b: Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they?	Count	Percent of Question Respondents
Tourism / Hospitality	7	7%
First Aid	8	8%
Management	6	6%
Social Media	3	3%
industry specific training	21	22%
Food Safe	6	6%
Leadership	4	4%
Software	3	3%
Communications	1	1%
Accounting	5	5%
Sales	6	6%
Mental Health	2	2%
Customer Service	4	4%
Total	97	
Survey Participants:	69	
Question Respondents:	52	

No Response Count: 17
 Parent Question 'Yes' Respondents: 51
 Parent Question Respondents: 68
 Response Rate: 75%

Figure 36: What new training might you need to consider in the next five years?	Count	Percent of Question Respondents
Facilities Maintenance	1	2%
Hospitality	1	2%
Customer Service	2	4%
Human Resources	1	2%
Business Management	1	2%
Driver and Equipment Operator Training	1	2%
Culinary training	2	4%
Social Media	6	11%
Accounting	2	4%
Electric Vehicle	1	2%
Beer and Wine production	1	2%
Import / Export Training	1	2%
Project Management	1	2%
Customer service	2	4%
Government regulations	2	4%
Internet and online sales	5	9%
Sales & Marketing	4	8%
Social Media	6	11%
Leadership	1	2%
Computer and technology training	10	19%
Construction Industry related skills and knowledge	7	13%
New Building Technologies	1	2%
Total	59	

Survey Participants: 69
 Question Respondents: 53
 No Response Count: 16
 Response Rate: 77%

Figure 37: What modes of education/training work best for you?	Count	Percent of Question Respondents
Individual coaching	27	24%

Online/ Webinar training	39	35%
Classroom	38	34%
Other	8	7%
Total	112	

Survey Participants: 69
Question Respondents: 67
No Response Count: 2
Response Rate: 97%

Figure 38: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	4	5%
Rest of Canada	13	15%
Regional	8	9%
British Columbia	17	20%
Local	45	52%
Total	87	

Survey Participants: 69
Question Respondents: 65
No Response Count: 4
Response Rate: 94%

Union status	Count	Percent of Question Respondents
Yes	3	4%
No	64	93%
Not applicable	2	3%
Total	69	

Survey Participants: 69
Question Respondents: 69
No Response Count: 0
Response Rate: 100%

Figure 39: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Transportation	38	57%
Child care	37	55%

Housing	60	90%
Cost of living	52	78%
Other	5	7%
Total	192	

Survey Participants: 67
 Question Respondents: 67
 No Response Count: 0
 Response Rate: 100%

Figure 39b: Please indicate which issues you believe are critical to your employees?: If <i>Other</i>, please list any other issues	Count	Percent of Question Respondents
Benefits	3	60.00%
Seasonal Nature of Work	1	20.00%
Flextime	1	20.00%
Wages	1	20.00%
Total	6	

Survey Participants: 67
 Question Respondents: 5
 No Response Count: 0
 Parent Question 'Other' Respondents: 5
 Parent Question Respondents: 67
 Response Rate: 100%

Sales

Figure 40: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	0	0%
\$49,999 to \$25,000	1	3%
\$99,999 to \$50,000	1	3%
\$499,999 to \$100,000	7	19%
\$999,999 to \$500,000	5	14%
\$4.9 million to 1 million	14	39%
\$9.9 million to 5 million	2	6%
\$19.9 million to 10 million	3	8%
over \$20 million	3	8%
Total	36	

Survey Participants: 69
 Question Respondents: 36
 No Response Count: 33
 Response Rate: 52%

Figure 41: Is the market for your product	Count	Percent of Question Respondents
Stable	18	26%
Decreasing	2	3%
Increasing	49	71%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 42: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents

Stable	25	39%
Decreasing	2	3%
Increasing	37	58%
Total	64	

Survey Participants: 69
Question Respondents: 64
No Response Count: 5
Response Rate: 93%

Figure 43: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	2	3%
0%	4	6%
1 - 9%	26	39%
10 - 24%	31	46%
25 - 49%	2	3%
Over 100%	2	3%
Total	67	

Survey Participants: 69
Question Respondents: 67
No Response Count: 2
Response Rate: 97%

Figure 44: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	3	5%
Staying the same	12	18%
Increasing	48	74%
Not applicable	2	3%
Total	65	

Survey Participants: 69
Question Respondents: 65
No Response Count: 4
Response Rate: 94%

Figure 44b: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Declining	0	0%
Staying the same	8	13%
Increasing	25	41%
Not applicable	28	46%
Total	61	

Survey Participants: 69
 Question Respondents: 61
 No Response Count: 8
 Response Rate: 88%

Figure 44c: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	7	11%
Staying the same	13	21%
Increasing	42	68%
Not applicable	0	0%
Total	62	

Survey Participants: 69
 Question Respondents: 62
 No Response Count: 7
 Response Rate: 90%

Figure 44d: Historical export sales trend	Count	Percent of Question Respondents
Declining	1	1%
Staying the same	1	1%
Increasing	3	4%
Not applicable	63	93%
Total	68	

Survey Participants: 69

Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 46: Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
1 - 9%	21	47%
10 - 25%	14	31%
26 - 50%	3	7%
51 - 75%	5	11%
76 - 100%	2	4%
Total	45	

Survey Participants: 67
 Question Respondents: 45
 No Response Count: 22
 Response Rate: 67%

Figure 47: Source of Majority of Sales	Count	Percent of Question Respondents
Local	38	59%
Provincial	2	5%
National	23	50%
United States	0	0%
International	0	0%
Total	59	

Fig 47b. Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	40	58%
No	29	42%
Total	69	

Survey Participants: 69
 Question Respondents: 69

No Response Count: 0
 Response Rate: 100%

Figure 48: International trade status	Count	Percent of Question Respondents
Import	3	4%
Export	3	4%
None	17	25%
Not applicable	46	67%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 49: Do you engage in government procurement?	Count	Percent of Question Respondents
Yes	6	9%
No	61	91%
Total	67	

Survey Participants: 67
 Question Respondents: 67
 No Response Count: 0
 Response Rate: 100%

Figure 50: Source of Majority of Supplies	Count	Percent of Question Respondents
Local	28	48%
Provincial	12	23%
National	24	42%
United States	1	4%

International	2	9%
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Figure 51: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?	Count	Percent of Question Respondents
No applicable to this business	3	3%
Loyalty to current supplier	1	1%
No control - head office decision	4	4%
Quality of available products	7	7%
Unaware of local vendors	0	0%
Higher costs locally	35	33%
Product not available here	55	51%
Other	2	2%
Total	107	

Survey Participants: 67
 Question Respondents: 65
 No Response Count: 2
 Response Rate: 97%

Facilities and Equipment

Figure 52: What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents
less than 1,000 sq ft	6	9%
1,000-4,999 sq ft	30	43%
5,000-9,999 sq ft	10	14%
10,000-19,999 sq ft	5	7%
20,000 sq ft or more	18	26%
Total	69	

Survey Participants: 69

Question 69
 Respondents:
 No Response Count: 0
 Response Rate: 100%

Figure 53: Condition of facility	Count	Percent of Question Respondents
Excellent	16	23%
Good	39	57%
Fair	9	13%
Poor	5	7%
Total	69	

Survey Participants: 69
 Question 69
 Respondents:
 No Response Count: 0
 Response Rate: 100%

Figure 54: Condition of equipment	Count	Percent of Question Respondents
Excellent	19	28%
Good	36	54%
Fair	11	16%
Poor	1	1%
Total	67	

Survey Participants: 69
 Question 67
 Respondents:
 No Response Count: 2
 Response Rate: 97%

Figure 55: Status of facility	Count	Percent of Question Respondents
Owned	40	58%

Leased	29	42%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 56: Status of facility: If <i>Leased</i>, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	6	60%
1-2 Years	0	0%
3-5 Years	4	40%
>5 Years	0	0%
Total	10	

Survey Participants: 69
 Question Respondents: 10
 No Response Count: 59
 Parent Question 'Leased' Respondents: 29
 Parent Question Respondents: 69

Figure 56b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	25	83.33%
No	5	16.67%
Total	30	

Survey Participants: 69
 Question Respondents: 30
 No Response Count: 39

Parent Question
'Leased' Respondents: 29

Parent Question
Respondents: 69

Response Rate: 103%

Figure 57: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	10	15%
Own	55	85%
Total	65	

Survey Participants: 69

Question
Respondents: 65

No Response Count: 4

Response Rate: 94%

Figure 58: Historical investment trends: Over past 18 months in the <u>facility</u>	Count	Percent of Question Respondents
Declining	3	4%
Staying the same	20	30%
Increasing	44	66%
Total	67	

Survey Participants: 69

Question
Respondents: 67

No Response Count: 2

Response Rate: 97%

Figure 59: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	42	61%
No	23	33%

Maybe	4	6%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 60: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	47	68%
No	22	32%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 61: Does the company plan to expand in the next three years?: Is your current site adequate for the proposed expansion?	Count	Percent of Question Respondents
Yes	37	80%
No	9	20%
Total	46	

Survey Participants: 69
 Question Respondents: 46
 No Response Count: 23
 Parent Question 'Yes' Respondents: 47
 Parent Question Respondents: 69

Figure 62: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents
Yes	46	98%
No	1	2%
Total	47	

Survey Participants: 69
 Question Respondents: 47
 No Response Count: 22
 Parent Question 'Yes' Respondents: 47
 Parent Question Respondents: 69

Figure 63: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	0	0%
\$25,000-\$99,999	7	23%
\$100,000-\$499,999	7	23%
\$500,000 - \$999,999	5	16%
\$1-\$4.9 million	7	23%
\$5 - 9.9 million	2	6%
\$10-19.9 million	3	10%
Total	31	

Survey Participants: 69
 Question Respondents: 31
 No Response Count: 38
 Parent Question 'Yes' Respondents: 47

Figure 64: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
Under 50%	8	28%
50 to 99%	11	38%
100%	10	34%
Total	29	

Survey Participants: 69
 Question Respondents: 29
 No Response Count: 40
 Parent Question 'Yes' Respondents: 47
 Parent Question Respondents: 69
 Response Rate: 62%

Figure 65: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents
Under 50%	12	46%
50 to 99%	10	38%
100%	4	15%
Total	26	

Survey Participants: 69
 Question Respondents: 26
 No Response Count: 43
 Parent Question 'Yes' Respondents: 47
 Parent Question Respondents: 69
 Response Rate: 55%

Figure 66: Does the company plan to expand in the next three years?: Estimated facility size increase (square feet)	Count	Percent of Question Respondents
Less than 1,000 sq ft	11	46%
1,000 to 4,999 sq ft	4	17%
5,000-9,999 sq ft	3	13%
10,000 - 19,999 sq ft	2	8%
20,000 sq ft or more	4	17%
Total	24	

Survey Participants: 69
 Question Respondents: 24
 No Response Count: 45
 Parent Question 'Yes' Respondents: 47
 Parent Question Respondents: 69
 Response Rate: 51%

Figure 67: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	50	72%
No	19	28%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 67b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents

3	18	38%
6	5	11%
12	16	34%
18	1	2%
24	4	9%
36	3	6%
Total	47	

Survey Participants: 69

Question Respondents: 47

No Response Count: 22

Parent Question 'Yes' Respondents: 50

Parent Question Respondents: 69

Response Rate: 94%

Figure 68: Planning any upgrades to the facility?	Count	Percent of Question Respondents
Yes	51	74%
No	18	26%
Total	69	

Survey Participants: 69

Question Respondents: 69

No Response Count: 0

Response Rate: 100%

Figure 68b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	15	35%
6	6	14%
12	13	30%
24	7	16%
36	2	5%

Total	43	
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Survey Participants: 69
 Question Respondents: 43
 No Response Count: 26
 Parent Question 'Yes' Respondents: 49
 Parent Question Respondents: 67
 Response Rate: 88%

Figure 69: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Financing	1	8%
No upgrades are necessary	7	58%
Landlord is responsible for upgrades	4	33%
Total	12	

Survey Participants: 69
 Question Respondents: 12
 No Response Count: 57
 Parent Question 'No' Respondents: 18
 Parent Question Respondents: 69
 Response Rate: 67%

Figure 70: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Broadband access	2	3%
Warehousing	2	3%

Energy costs	2	3%
Local regulations e.g. zoning	13	17%
Problems with Development Approvals	0	0%
Identifying and accessing new markets	2	3%
Other (please specify):	14	18%
Finance	17	22%
Lack of suitable premises	11	14%
Lack of skilled staff	15	19%
Total	78	

Survey Participants: 69
 Question Respondents: 45
 No Response Count: 24
 Response Rate: 74%

Figure 70b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
affordable housing	1	7%
staff accommodation	1	7%
having the time	2	14%
lack of space	6	43%
cost of building	1	7%
size of local economy	1	7%
availability of materials	2	14%
Total	14	

Survey Participants: 69

Question Respondents: 14
 No Response Count: 55
 Parent Question 'Other (please specify):' Respondents: 14
 Parent Question Respondents: 69
 Response Rate: 100%

Figure 71: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	17	33%
No	34	67%
Total	51	

Survey Participants: 69
 Question Respondents: 51
 No Response Count: 18
 Response Rate: 74%

Figure 71b: If Yes, which have you approached?	Count	Percent of Question Respondents
BC Ministry responsible for Economic Development	1	4%
Local Economic Development Office	4	15%
Chamber of Commerce	2	8%
Community Futures	3	12%
Local Council	4	15%
Other	12	46%
Total	26	

Survey Participants: 69
 Question Respondents: 17
 No Response Count: 52
 Parent Question 'Yes' Respondents: 17
 Parent Question Respondents: 51
 Response Rate: 100%

Figure 71c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
Parks Canada	1	8%
BDC (Business Development Bank of Canada)	2	15%
Shuswap Indian Band	1	8%
BBA (Basin Business Advisors)	1	8%
Columbia Basin Broadband Corp.	1	8%
RDEK	3	23%
CBT (Columbia Basin Trust)	4	31%
Total	13	

Survey Participants: 69
 Question Respondents: 12
 No Response Count: 0
 Parent Question 'Other' Respondents: 12
 Parent Question Respondents: 51
 Response Rate: 100%

Figure 72: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	38	57%
No	29	43%
Total	67	

Survey Participants: 67
 Question Respondents: 67
 No Response Count: 0
 Response Rate: 100%

Figure 73: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	27	39%
No	42	61%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Government Services

Figure 74: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	65	94%	2	3%	0	0%	1	1%	1	1%	69
Access to US Border	30	44%	3	4%	4	6%	25	37%	6	9%	68
Access to airport facilities	9	13%	23	33%	21	30%	11	16%	5	7%	69
Access to highway/ roads	0	0%	2	3%	16	23%	36	52%	15	22%	69
Access to markets	5	8%	4	6%	16	24%	34	52%	7	11%	66
Access to suppliers	0	0%	20	29%	28	41%	19	28%	2	3%	69
Availability of appropriately zoned land	20	29%	16	23%	12	17%	18	26%	3	4%	69
Availability of buildings for lease or purchase	24	35%	22	32%	11	16%	11	16%	1	1%	69
Availability of rail transport	63	93%	3	4%	0	0%	1	1%	1	1%	68
Availability of road transport services	0	0%	27	39%	18	26%	22	32%	2	3%	69
Availability of warehousing	45	65%	8	12%	3	4%	11	16%	1	1%	69
Development approval process	25	37%	18	26%	9	13%	15	22%	1	1%	68

Disposal of waste material	5	7%	13	19%	6	9%	34	49%	11	16%	69
Inspections /licensing	11	16%	8	12%	13	19%	32	46%	5	7%	69
Recycling	3	4%	19	28%	15	22%	26	38%	6	9%	69
Telecommunications (internet, cell)	2	3%	17	25%	16	23%	26	38%	8	12%	69
Water and sewerage supply	3	4%	7	10%	8	12%	42	61%	9	13%	69

Survey Participants: **69** 75

Figure 75: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	54	78.26%
No	15	21.74%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 75b: Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If Yes, how?	Count	Percent of Question Respondents
Improve Electrical Service	1	1%
Improve Emergency Response	1	1%
Reduce cost for utilities	6	8%
Provide access to sanitary waste water dumping	2	3%
Improve Bottle Return Facility	1	1%
Improve signage for businesses along the highway	1	1%
Improve courier services	7	9%
Increase Government Efficiency	1	1%
Improve Communication and Collaboration among businesses and government	1	1%
Install / Upgrade Broadband	3	4%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	5	6%
provide access to rail service	1	1%
Improve highway and road quality and service	5	6%
Increase / Update Water Services	2	3%
Provide local wholesaler	2	3%
Improve warehousing options	3	4%
Increase public transportation	3	4%

Create New Business Welcome Package	1	1%
Improve Airport service	1	1%
Improve shipping and receiving	2	3%
Streamline development approval processes	9	12%
Improve recycling and waste management	15	19%
Create access to commercial and industrial land	4	5%
Total	77	

Survey Participants: 69

Question Respondents: 54

No Response Count: 15

Parent Question 'Yes' Respondents: 54

Parent Question Respondents: 69

Response Rate: 100%

Figure 76: Which airport services do you use?	Count	Percent of Question Respondents
Spokane	2	3%
Kalispell	0	0%
Cranbrook	36	55%
Calgary	48	74%
Kelowna	1	2%
None	3	5%
Total	82	

Survey Participants: 69

Question Respondents: 65

No Response Count: 4

Response Rate: 94%

Figure 77: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
More destinations	2	10%
More flights	9	43%
Vehicle Rentals	2	10%
Shuttle service	8	38%
Total	21	
Survey Participants:	69	
Question Respondents:	21	
No Response Count:	48	
Response Rate:	30%	

Business Climate

Figure 78: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	5	7%
Good	30	44%
Fair	27	40%
Poor	6	9%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 79: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	No Responses	Respondents
Chamber of Commerce	11	16%	5	7%	15	22%	25	36%	13	19%	0	69
Colleges/Universities	25	39%	6	9%	16	25%	15	23%	2	3%	5	64
Community Futures	43	67%	4	6%	2	3%	10	16%	5	8%	5	64
Cultural/Recreational Amenities	1	1%	9	13%	22	32%	29	42%	8	12%	0	69
Economic Development	8	12%	17	25%	22	32%	17	25%	5	7%	0	69
Housing	0	0%	46	67%	17	25%	6	9%	0	0%	0	69
K-12 education	12	18%	3	5%	5	8%	41	62%	5	8%	3	66
Local Government	6	9%	21	32%	17	26%	21	32%	1	2%	3	66
Local Tax Structure	8	12%	11	16%	24	35%	23	34%	2	3%	1	68
Technical Training	23	35%	17	26%	17	26%	8	12%	0	0%	4	65
Tourism services	7	10%	4	6%	12	18%	33	49%	12	18%	1	68
Workforce Availability	1	1%	32	46%	20	29%	14	20%	2	3%	0	69
Workforce Quality	0	0%	13	19%	24	35%	25	36%	7	10%	0	69

Workforce Stability	3	4%	16	21%	28	37%	27	36%	1	1%	75	
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Survey Participants: 69

Figure 80: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	37	56%
No change	16	24%
Worse today	7	11%
No opinion	6	9%
Total	66	

Survey Participants: 69
 Question Respondents: 66
 No Response Count: 3
 Response Rate: 96%

Figure 81: Do you have any forecast for the condition of the local business climate 5 years from today?	Count	Percent of Question Respondents
Will be better	42	61%
No change	16	23%
Will be worse	4	6%
No opinion	7	10%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 82: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Social network	6	9%
Stable economy	5	7%
Word of mouth	1	1%
Affluent residents	3	4%
Customer loyalty	2	3%
Friendliness	2	3%
Natural attractions	20	29%

Location	19	28%
Recreational opportunities	13	19%
Lifestyle	4	6%
Tourism	16	23%
Supportive community	10	14%
Total	101	

Survey Participants: 69

Question Respondents: 68

No Response Count: 1

Response Rate: 99%

Figure 83: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Development Constraints (Zoning/Bureaucracy/Permits)	5	7%
Lack of suppliers	6	9%
Poor customer service	1	1%
Small Population	8	12%
Lack of Transportation	5	7%
Lack of support for local businesses	8	12%
Lack of Leadership, Vision, & Collaboration	8	12%
Lack of amenities/Services	9	13%
Affordable Housing	13	19%
Wildfires	4	6%
Geographic isolation	6	9%
Lack of workforce & workforce stability	14	20%
High cost of living	6	9%
Seasonality	16	23%
Total	109	

Survey Participants: 69

Question Respondents: 69

No Response Count: 0

Response Rate: 100%

Figure 84: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	58	84.06%
No	11	15.94%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 84b: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Lack of Support for Business	5	7%
Affordable housing	14	20%
Attitudinal barriers	9	13%
Transportation	3	4%
Availability of land	6	9%
Lack of Vision and/or Plan	3	4%
Seasonality	8	12%
Marketing / Promotion	3	4%
Cost of doing business	4	6%
Available workforce	13	19%
Developmental approval process	6	9%
Low population	4	6%
Geographic isolation	3	4%
Total	81	

Survey Participants: 69
 Question Respondents: 58

No Response Count:	11
Parent Question 'Yes' Respondents:	58
Parent Question Respondents:	69
Response Rate:	100%

Figure 85: 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	46	79%	1	2%	4	7%	0	0%	1	2%	6	10%	58
Chamber of Commerce	15	23%	1	2%	2	3%	8	13%	18	28%	20	31%	64
Community Futures	42	69%	0	0%	3	5%	2	3%	8	13%	6	10%	61
Continuing Education and Workforce Training	19	30%	2	3%	1	2%	10	16%	26	41%	6	9%	64
Economic Development Organization / Commission	27	43%	0	0%	7	11%	7	11%	13	21%	9	14%	63
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	58	97%	0	0%	1	2%	0	0%	1	2%	0	0%	60
Invest Kootenay	48	80%	0	0%	3	5%	2	3%	2	3%	5	8%	60
Kootenay Aboriginal Business Advocates Society	59	98%	0	0%	0	0%	1	2%	0	0%	0	0%	60
National Research Council Industrial Research Assistance	60	100%	0	0%	0	0%	0	0%	0	0%	0	0%	60
Scientific Research and Experimental Development Tax Incentive Program	55	92%	0	0%	1	2%	0	0%	3	5%	1	2%	60

Survey Participants: 67

Figure 86: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	44	64%
No	25	36%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 86b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Parts Supplier	1	3%
Office Supplies	2	5%
Architectural Services	1	3%
Lifestyle Clothing	1	3%
Distribution and Warehouse	1	3%
Storage Facilities	1	3%
Heavy equipment maintenance	1	3%
Appliance sales and repairs.	2	5%
Industrial supply	1	3%
Pet food / grooming	1	3%
Tire Supplier	1	3%
Cleaning Supplies	1	3%
Utility Service Firms	1	3%
Car wash	1	3%
Office supplies	2	5%
Freight Companies	1	3%
small-scale furniture manufacturers	2	5%
Technology companies	2	5%
Coffee Roaster	3	8%
Wholesale Supplier for food/restaurants	11	28%
Total	39	

Survey Participants: 69
Question Respondents: 40
No Response Count: 29
Parent Question 'Yes' Respondents: 44
Parent Question Respondents: 99%
Response Rate: 91%

Figure 87: Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Tourism Related	13	21%
Landscaping	2	3%
Technology	12	19%
Recreation	2	3%
Transportation	1	2%
Car Wash	1	2%
Fire Fighters	1	2%
Wholesale Food and Beverage Suppliers	1	2%
Construction	2	3%
Health and Wellness	2	3%
Food Packaging & Labelling	1	2%
Trucking	1	2%
Small engine repair	1	2%
Distribution & warehouse facility	1	2%
Manufacturing	2	3%
Light / Heavy industries	1	2%
Wood pellet manufacturing plant	1	2%
Appliance Sales and Repairs	2	3%

Total 47

Survey Participants: 69

Question Respondents:	62
No Response Count:	7
Response Rate:	90%

Figure 88: Business competitiveness factors	Not applicable	% Not applicable	Not important at all	% Not important at all	not very important	% not very important	Some what important	% Some what important	Very important	% very important	Respo ndents	No Respo nse
Access to exporting and international markets	19	28%	21	31%	5	7%	9	13%	13	19%	67	0
Accessing capital	3	4%	2	3%	8	12%	25	37%	29	43%	67	0
Add or change in business, products or services	1	2%	8	12%	5	8%	28	42%	24	36%	66	1
Affordable shipping/freight	1	1%	2	3%	5	7%	15	22%	44	66%	67	0
Availability of telecommunications infrastructure and services	1	1%	0	0%	2	3%	14	21%	50	75%	67	0
Energy costs	1	1%	2	3%	5	7%	20	30%	39	58%	67	0
Exchange rate for Canadian dollar	1	1%	6	9%	8	12%	28	42%	24	36%	67	0
Expansion of workforce employees	0	0%	2	3%	6	9%	25	38%	33	50%	66	1
Improvement business management	1	1%	0	0%	5	7%	21	31%	40	60%	67	0
Improvement of customer services	2	3%	0	0%	0	0%	11	16%	54	81%	67	0
Improving worker productivity	1	2%	0	0%	1	2%	18	27%	46	70%	66	1

New market development locally	3	4%	7	10%	4	6%	18	27%	35	52%	67	0
New market development outside of region	3	4%	5	7%	9	13%	26	39%	24	36%	67	0
New product research and development	3	4%	2	3%	2	3%	23	34%	37	55%	67	0
Reliable air transportation	17	25%	14	21%	16	24%	12	18%	8	12%	67	0
Strategic alliances (joining with other businesses to provide products/services)	3	4%	4	6%	4	6%	23	34%	33	49%	67	0
Water/sewer availability	6	9%	3	4%	9	13%	13	19%	36	54%	67	0
Water/sewer costs	9	13%	5	7%	6	9%	22	33%	25	37%	67	0
Workforce skill development	0	0%	0	0%	5	7%	19	28%	43	64%	67	0
Workplace health and safety	3	5%	2	3%	2	3%	8	12%	51	77%	66	1

Survey Participants: 67

Figure 89: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	2	3%	1	1%	18	27%	35	52%	11	16%	67
Investing in people and skills	0	0%	1	1%	6	9%	45	67%	15	22%	67
Leadership and management capacity	0	0%	0	0%	5	7%	39	58%	23	34%	67
Measuring impact of productivity efforts/ investments	3	5%	7	11%	12	18%	36	55%	8	12%	66
Networking and collaboration with other businesses	2	3%	7	10%	15	22%	35	52%	8	12%	67
Organizing work (structures & processes)	0	0%	2	3%	8	12%	42	63%	15	22%	67
Productive workplace culture	0	0%	0	0%	1	1%	42	63%	24	36%	67

Survey Participants: 67

Figure 90: 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)	Count	Percent of Question Respondents
Finance	0	0%
Government	2	3%
Manufacturing	11	17%
Agriculture	7	11%
Education	7	11%
Green or environmental businesses	14	22%
Other niche service businesses (e.g. services to seniors)	8	13%
Forestry	11	17%
Technology-based businesses	28	44%
Health & wellness	12	19%
Arts	9	14%
Construction	18	28%
culture and creative businesses	9	14%
Relocation of people from urban centres	26	41%
Tourism	42	66%
Other	11	17%
Total	215	

Survey Participants: 67
Question Respondents: 64
No Response Count: 3
Response Rate: 96%

Figure 90b: 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 <i>Other</i> please specify	Count	Percent of Question Respondents
Sports tourism (hockey teams, etc)	1	
Distribution centre!	2	
Education: Private Schools	1	
Commercial marijuana grow ups	1	
Total	5	

Survey Participants: 67
 Question Respondents: 5
 No Response Count: 62
 Parent Question 'Other' Respondents: 11
 Parent Question Respondents: 67
 Response Rate: 45%

Figure 91: Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
Yes	64	95.52%
No	3	4.48%
Total	67	

Survey Participants: 67
 Question Respondents: 67
 No Response Count: 0
 Response Rate: 100%

Figure 91b: Is your business impacted by its proximity to the	Count	Percent of Question Respondents
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Alberta border?: If Yes, please explain		
Negative - lack of sales due to PST	3	5%
Positive Ripple effect	3	5%
Positive - Alberta customers	17	30%
Positive - Alberta tourists	34	60%
Total	57	

Survey Participants: 67

Question Respondents: 61

No Response Count: 6

Parent Question 'Yes' Respondents: 64

Parent Question Respondents: 67

Response Rate: 95%

Assessment and Plans

Figure 92: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	22	32%
Good	40	58%
Fair	7	10%
Poor	0	0%
Total	69	

Survey Participants: 69

Question Respondents: 69

No Response Count: 0

Response Rate: 100%

Figure 93: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	16	24%
Good	15	22%
Fair	3	4%
Not applicable	34	50%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%

Figure 94: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	34	49%
Good	32	46%
Fair	3	4%
Total	69	
Survey Participants:	69	

Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 95: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	17	25%
Good	17	25%
Not applicable	35	51%
Total	69	

Survey Participants: 69
 Question Respondents: 69
 No Response Count: 0
 Response Rate: 100%

Figure 96: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
High	4	6%
Moderate	3	4%
Low	61	90%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1

Figure 97: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	1	1%
Moderate	4	6%
Low	63	93%
Total	68	

Survey Participants: 69
 Question Respondents: 68
 No Response Count: 1
 Response Rate: 99%