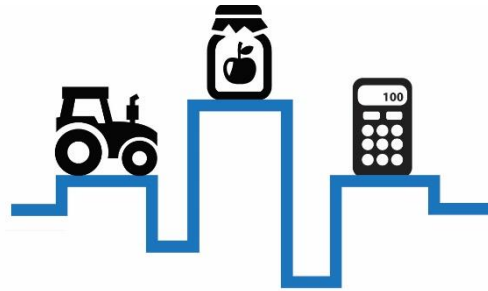




COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON CRESTON & DISTRICT BUSINESSES
WINTER/SPRING 2016



COMMUNITY BUSINESS PULSE



COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

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



employment. business. community.



CRESTON VALLEY

TOWN of CRESTON



REGIONAL DISTRICT OF
CENTRAL KOOTENAY

Columbia
Basin **trust**

The economic well-being of our community is based upon our existing businesses. In recognition of this, positive action is being taken to identify and meet the needs of these businesses. Kootenay Employment Services, the Town of Creston, local RDCK areas and the Columbia Basin Trust are partnering to fund this project. Other partners helping to implement this project include the Creston Valley Chamber of Commerce, Kootenay Lake Chamber of Commerce, Community Futures Central Kootenay, College of the Rockies, and the Rural Development Institute.

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted with 80 businesses within Creston & District (communities between Yahk and Riondel). 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 'Agriculture, Forestry, Fishing and Hunting' and 'Retail and Wholesale Trade' under the North American Industry Classification (NAICS) system. Regarding those classified as 'Agriculture, Forestry, Fishing and Hunting' it is important to note that the BRE stakeholder committee deliberately focused on the agricultural sector for this study and as a result, while the NAICS code is broad, participants were largely agricultural.
	The community was the most frequently cited reasons given for success in the Creston area.
	Most companies surveyed have been in business for more than 20 years.
	Over half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 1,711 employees.
	The majority of employees are temporary.
	Marketing and Bookkeeping Skills were most commonly listed as key training and Professional Development areas.
	The most critical considerations for employees is the cost of living and housing.
Sales	The majority of businesses indicated the market for their product/service is increasing.
	74% of businesses report that the majority of their sales are to customers within the community or region.
	The most frequent reason for purchasing products or services outside of the area is that the product is not available locally.
	44% of businesses indicated that they will need to access financial capital in the next 1 – 3 years.
Facilities and Equipment	78% of businesses own the facility in which they operate.
	Just under half of businesses plan to expand within 3 years, with the vast majority indicating that expansion will occur within the community.
	Top barriers to expansion are financing and identifying new markets.
Government Services	Top rated government services include access to the US border, access to highway/roads, and recycling. The lowest rated government services include access to airport facilities, access to suppliers, and availability of road transport services.
	Highway infrastructure and high speed internet services are the government services most in need of improvement.

	The Canadian Rockies International Airport (Cranbrook) is the most used airport by local businesses.
Business Climate	The overall business climate was rated as fair 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 cultural/recreational amenities and K-12 education.
	Tourism and Agricultural value added businesses were most commonly cited as sectors, businesses, or industries that could be attracted to the region.
	The business competitiveness factors that are most important to respondents include improvement of business management, availability of telecommunications infrastructure and services, and workplace health and safety.
Assessment and Plans	The overall health of their company was rated as good by 74% of businesses and excellent by 16% of businesses.
	Fewer than 4% of businesses are at a high risk of closing or and less than 3% at risk of downsizing.

NEXT STEPS AND POTENTIAL ACTIONS

The results of this survey can be used to inform short- and long-term planning. In addition, a number of businesses would benefit from follow-up support. Research findings suggest that the following action areas have the greatest potential to improve the business climate:

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 1,711 employees. The majority (41%) of employees are temporary, followed closely by 38% full time employees. The size of the workforce appears stable and healthy, with 53% of businesses indicating that the number of employees at their business has stayed the same, and 27% indicating that the number has increased. Expected employment trends are also stable with the majority of businesses expecting the number of casual, part time, and full time employees to stay the same. Actions that could prove helpful include: support and expand recruitment efforts, assist with coordination of casual/temporary employee recruitment, and education/training on recruitment. Targeted actions to these areas could be considered. Related to recruitment and retention are the identified critical considerations for employees which include the cost of living, housing, childcare, and transportation. Interest was expressed in establishing a farm labour pool with an aim to better link farmers and available labour.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with just 7% of essential employees under the age of 25. The number of aging farmers is seen as indicative of the need for succession planning, but questions remain surrounding the number of youth available to take over farms. Increasing youth employment may assist in addressing the recruitment challenges that 43% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

Business Growth & Expansion

57% of businesses in the region report being in a growth cycle and 30% are maturing; however 29% are not anticipating any growth in sales over the next year, with 33% expecting moderate sales growth between 1 – 9%. The vast majority of businesses (74%) indicate that the majority of their sales are to local markets, indicating there may be an opportunity to expand into surrounding markets. 43% indicate that they are planning to expand within the next three years. 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, exploring financing options, 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, identifying and accessing new markets, and a lack of skilled staff. It is worth noting that very few (32%) 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. New opportunities exist, such as a composting or value-added facility utilizing agricultural waste (e.g., cherry culls).

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small to medium in size and independent. Tailoring supports and services to small, independent businesses, perhaps with specific actions directed at the agricultural sector will benefit businesses in Creston & District.

Natural Resources/Agriculture Focus

There are a significant number of businesses in the agricultural, forestry, fishing, and hunting sectors (29% according to the industry classification). However, it is important to note that the BRE stakeholder committee deliberately focused on the agricultural sector only for this study. The importance of the agricultural industry warrants specific and additional review to understand the specific challenges and opportunities this sector faces. An industry based stakeholder meeting could be convened to explore how this sector can specifically be supported. Interest was expressed in the reinstatement of a local agriculture extension office, together with a reinstatement of Canadian Food Inspection Agency and Interior Health's Environmental Health offices.

Supply Sourcing and Procurement

The data indicates that 48% of supplies come from within the local region. The most common response (70%) for the reason why supplies are sourced outside of the local area is that they are not available locally. Agricultural suppliers and packaging materials were the most frequently cited areas for potential suppliers to the Creston area. 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. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally.

Local businesses do not appear to engage actively with government procurement processes, with only 18% of businesses indicating that they have. Education and awareness of the opportunities

available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 58% of businesses have a training budget and 73% indicated that training typically occurs locally. Areas for additional training/skill development include marketing skills, bookkeeping, and food safe. Future areas for training focused on computer and new technology training, as well as marketing, social media, and emerging technologies. 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 19% of respondents indicated that they have a formal succession plan and less than half (45%) have an up-to-date business plan. With 49% of businesses indicating that they have been in business for more than 20 years, succession planning is timely for many. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent 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.

Financing

When financing was accessed, the most frequent type was internal (84% of businesses) in the form of personal savings or retained earnings. There is a market for businesses to access financing, with 44% of businesses indicating they will need to access financing in the next 1 – 3 years for purposes of expanding or improving equipment (78%) or making improvements to their land/building (66%). Businesses were most frequently (43%) looking for \$100,000 or more in future capital, with 32% indicating they would need \$25,000 or less. There does appear to be a market and an appetite for a community model of financing, with opportunities in small loans of \$25,000 or less and larger loans of over \$100,000. Further exploration and development of a community based financing model or microloan program appears warranted.

TABLE OF CONTENTS

Executive Summary.....	ii
Key Research Findings	ii
Next Steps and Potential Actions	iii
List of Figures.....	vii
Project Overview	1
The BRE Concept	1
Project Objectives	1
Research Considerations	2
The BRE Survey	2
The Data Set.....	2
Data Collection.....	3
Data Input, Analysis and Reporting	3
Research Findings	4
Company Information	4
Local Workforce	10
Sales	22
Facilities and Equipment.....	31
Government Services	39
Business Climate	43
Assessment and Plans	57
Recommendations	60
Next Steps.....	60
Potential Action Areas.....	61
Appendix A: Data Tables	64
Company Information	64
Local Workforce	74
Sales	94
Facilities and Equipment.....	118
Government Services	132
Business Climate	137
Assessment and Plans	153

LIST OF FIGURES

Figure 1: Industry classification	4
Figure 2: Facility function(s)	5
Figure 3: Location of primary competitors	5
Figure 4: Key words and responses respondents' discussions of the factors that make them successful in this region.....	5
Figure 5: Other Locations	6
Figure 6: Location of Other Locations	6
Figure 7: Location of headquarters	7
Figure 8: Life cycle stage.....	7
Figure 9: Length of time in business.....	7
Figure 10: Type of business	8
Figure 11: Ownership and management changes in last 5 years.....	8
Figure 12: Anticipated timeline for ownership change.....	8
Figure 13: Anticipated exit strategy	9
Figure 14: Existence of formal succession plan.....	9
Figure 15: Existence of current business plan	9
Figure 16: Total number of employees	10
Figure 17: Nature of employment.....	10
Figure 18: Historical Employment trend	11
Figure 19: Employment trend over last 3 years	11
Figure 20: Employment trend over next 3 years	12
Figure 21: Age of the majority of essential employees.....	12
Figure 22: Wages in relation to other businesses in the region.....	13
Figure 23: Trend in unfilled positions.....	13
Figure 24: Location of workforce recruitment	13
Figure 25: Recruitment and retention challenges.....	14
Figure 26: Key words and responses in respondents' discussion of retention efforts	14
Figure 27: Recruitment Activities	15
Figure 28: Current recruitment areas.....	16
Figure 29: Future areas where recruitment may be challenging	16
Figure 30: Strategies to overcome employee recruitment challenges	17
Figure 31: Skill level of majority of workforce.....	17
Figure 32: Training Budget	17
Figure 33: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills	18
Figure 34: Training or professional development needs.....	19
Figure 35: Areas for new Training in next five years	20
Figure 36: Preferred modes of training.....	20
Figure 37: Usual training locations.....	21
Figure 38: Critical considerations for employees	21
Figure 39: Annual sales.....	22
Figure 40: Status of market for product/service	22
Figure 41: Market Share in Comparison to Competitors	23
Figure 42: Projected sales growth in the next year.....	23
Figure 43: Historic sales trend	24
Figure 44: Sales generated by top three customers	24
Figure 45: Geographic source of majority of sales.....	25

Figure 46: International trade status.....	25
Figure 47: Engagement with government procurement processes.....	25
Figure 48: Geographic source of majority of supplies.....	26
Figure 49: Reason for out-of-area purchasing.....	26
Figure 50: Types of Financing	27
Figure 51: Types of Lending.....	27
Figure 52: Types of Capital Financing	27
Figure 53: Barriers to Capital Financing.....	28
Figure 54: Purpose for Future Financial Capital Needs	28
Figure 55: Source for Future Financial Capital Needs	29
Figure 56: Future Capital Needs	29
Figure 57: Community Investment Mechanism	29
Figure 58: Return on Investment: Social	30
Figure 59: Return on Investment: Financial	30
Figure 60: Return on Investment: Environmental	31
Figure 61: Size of facility	31
Figure 62: Condition of facility	32
Figure 63: Condition of equipment	32
Figure 64: Ownership status of facility	32
Figure 65: Length of time remaining on lease	33
Figure 66: Ownership preference.....	33
Figure 67: Historical Investment in facility (past 18 months).....	33
Figure 68: Room for expansion	34
Figure 69: Plans to expand within three years.....	34
Figure 70: Adequacy of current site to support expansion	34
Figure 71: Expansion to occur in community	35
Figure 72: Estimated expansion investment	35
Figure 73: Component of expansion budget for equipment and technology.....	35
Figure 74: Component of expansion budget for real estate	36
Figure 75: Size of facility expansion	36
Figure 76: Recent facility upgrades	36
Figure 77: Planning facility upgrades.....	37
Figure 78: Barriers to upgrading.....	37
Figure 79: Barriers to expansion.....	38
Figure 80: Organizations approached for expansion assistance	38
Figure 81: Considering energy efficiency in expansion plans.....	39
Figure 82: Awareness of BC Hydro Power Smart	39
Figure 83: Rating of government services	40
Figure 84: Key words and responses in respondents' suggestions for improvements to government services	42
Figure 85: Airport service used.....	42
Figure 86: New services at local airport	43
Figure 87: Rating of local business climate	43
Figure 88: Rating of business climate factors.....	44
Figure 89: Business climate today vs. 5 years ago.....	45
Figure 90: Business climate 5 years from today.....	46
Figure 91: Community's strengths as a place to do business.....	46
Figure 92: Community's weaknesses as a place to do business.....	47
Figure 93: Barriers to growth in the community	48

Figure 94: Level of service from business support providers.....	50
Figure 95: Potential Suppliers.....	51
Figure 96: Sectors, businesses or industries that could be attracted to region.....	52
Figure 97: Importance of business competitiveness factors.....	53
Figure 98: Performance on key productivity drivers.....	55
Figure 99: Economic drivers with greatest growth potential.....	56
Figure 100: Impact of Proximity to Alberta	57
Figure 101: Facility's overall health	57
Figure 102: Overall health of parent company	58
Figure 103: Local management's attitude toward community	58
Figure 104: Parent company's attitude toward local community.....	58
Figure 105: Risk of facility closing.....	59
Figure 106: Risk of facility downsizing.....	59

PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey¹ conducted within the Creston & District area during Winter/Spring 2016.

Economic development discussions in 2015 between Creston & District stakeholders indicated a need to complete an in-depth Business Retention and Expansion (BRE) study for the region. Little in-depth or updated business community information was available for guiding future economic development strategies. In a collaborative effort Kootenay Employment Services, the Town of Creston, Regional District of Central Kootenay, and Columbia Basin Trust funded the *Community Business Pulse* – Creston & District BRE study. Other local stakeholders guiding and helping to implement this initiative are the Creston Valley Chamber of Commerce, Kootenay Lake Chamber of Commerce, Community Futures Central Kootenay, and the College of the Rockies.

Before a community can assist existing businesses it must first identify the businesses' needs, concerns, and growth opportunities. Through the *Community Business Pulse* initiative, a trained researcher visits local businesses and gathers information. This information is compiled into a report which assists the local stakeholders partnering in this project to address identified issues and opportunities for community economic development in Creston & District.

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% of new jobs come from existing businesses.

PROJECT OBJECTIVES

Objectives specific to the Creston & District's BRE project were as follows:

1. Identify the needs, concerns, and opportunities of existing local businesses in order that, where appropriate, local action can be taken to respond to the businesses' needs or development opportunities;

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

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 community's pro-business attitude and develop an effective means of communication with local businesses;
4. Encourage the business community's active involvement in economic development.

RESEARCH CONSIDERATIONS

THE BRE SURVEY

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

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, as well as determine barriers to labour retention within Creston & District.

Creston & District stakeholders also appended seven financing specific questions to determine if businesses were planning to access financing for expansion efforts, and how they plan to raise capital.

THE DATA SET

The Town of Creston, Regional District of the Central Kootenay Areas A, B and C, and Lower Kootenay Band made up the geographic scope of the study area. A master list of Creston & District businesses was compiled by consolidating chamber listings, business licences, Link2Creston listings, and an online search through Google and Yellow Pages. The total business count reached 963 within Creston & District.

Creston & District businesses were sorted into 12 sectors taken from the North American Industry Classification System (NAICS): Accommodation, Food & Beverage; Agriculture & Farming; Arts, Entertainment & Recreation; Construction; Forestry & Mining; Health Care & Social Assistance; Manufacturing; Other Services; Professional Services; Real Estate/Rental Leasing; Retail; and Transportation & Warehousing. These businesses were then sorted into their respective geographic areas: Town of Creston, RDCK Areas A, B, C, and Lower Kootenay Band.

The aim was to survey approximately 10% of the businesses within Creston & District, with a focus on the Agriculture & Farming Sector and representation in each of the five geographical boundaries. A survey tool was created for the research consultant to follow, allocating a target number of surveys per sector, based on reflective percentage totals of the master business listing.

Businesses were chosen at random from the master business listing, and received an initial phone call from the research consultant or administrative assistant. If there was interest on behalf of the business, a project description and confirmation of survey time and date was sent by email.

In total, 80 businesses took part in a one-on-one interview with the research consultant. Responses were entered into a confidential database.

DATA COLLECTION

Confidential interviews were arranged between the participating businesses and the research consultant. A one-to-one in person survey was conducted either at the business or in a private office at Kootenay Employment Services. Each structured interview took an average of two hours to complete, with an additional hour spent to enter the responses into a secured database. In total 80 interviews were completed with business owners, CEO's, and executive directors of participating businesses.

DATA INPUT, ANALYSIS AND REPORTING

BRE project coordinator (Eden Yesh), research consultant (Erika Woker), administrative assistant (Teryl Hemmelgarn), and business follow-up coordinator (Alison Bjorkman) signed confidentiality forms with the RDI prior to embarking on this initiative. Respect of confidentiality during this project is very important and all information collected has been done so in a secure manner.

The research consultant has stored business information sheets and accompanying surveys separately, using numerical identifiers. This information was then forwarded in two separate emails to our research assistant, who entered interview responses into the Executive Pulse Database. The information from Executive Pulse was then analysed by staff at the RDI to create the following report. No individual business identifiers are published in this report.

Businesses requiring immediate assistance completed a follow-up form with the research coordinator and a consent to release information for the purposes of a follow-up. Project coordinator (Eden Yesh) and local Community Futures representative (Alison Bjorkman) recommended business support agencies, programs and training respective to the businesses' concerns. The follow-up was completed in person or by phone, with a summary of next steps for the business to act upon. Eight businesses received immediate follow-up assistance from the local Community Futures representative.

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 project lead, Kootenay Employment Services. Findings and related recommendations were assembled into this report by RDI researchers.

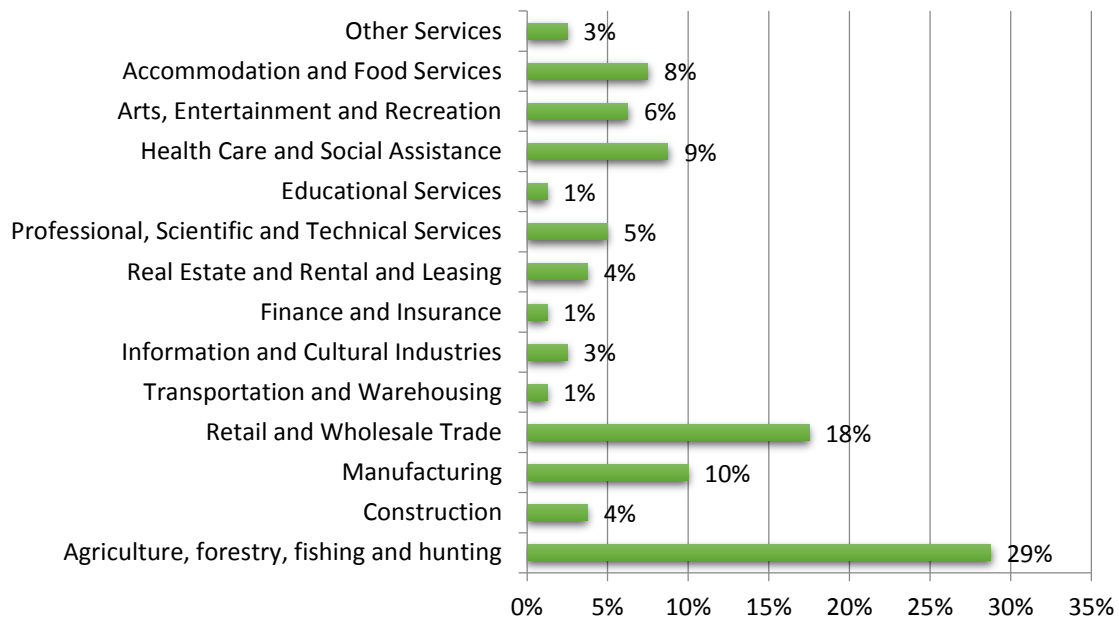
RESEARCH FINDINGS²

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Agriculture, Forestry, Fishing and Hunting (29% or 23 respondents), Retail and Wholesale Trade (18% or 14 respondents), and Manufacturing (10% or 8 respondents).

Figure 1: Industry classification



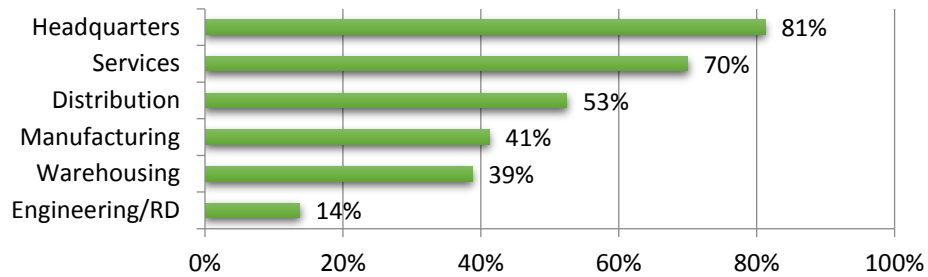
Note: 80 respondents

Facility Function

The majority of respondents (81% or 65 respondents) indicated that their facility acts as the headquarters. Other primary functions include 'services' (70% or 56 respondents) and 'distribution' (53% / 42 respondents). Fewer respondents indicated that their facility serves an engineering/research and development function.

² Some questions allow multiple responses, which can result in more responses than number of respondents.

Figure 2: Facility function(s)

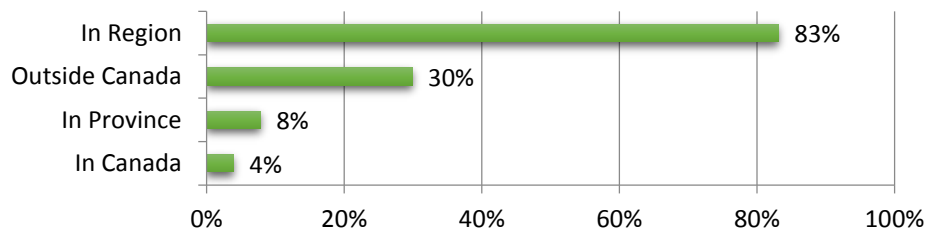


Note: 80 respondents

Competition

The vast majority of competition (83 % or 64 responses) reported was coming from within the regional area³.

Figure 3: Location of primary competitors



Note: 80 respondents

Factors for Success

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



When asked what factors made their company successful in this region, the highest number of respondents cited the supportive community (28% or 22 businesses), with location (21% or 17 businesses), and excellent staff (15% or 12 businesses) also discussed frequently.

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

"...incredibly supportive community which stems from highly committed team who want to make a difference in the community, strong community development piece."

"...positive "word of mouth" from within community groups."

"...location -- an hour away from any competition."

"...extremely hard working employees and owner/operators."

"...an incredibly beautiful environment."

"...centrally located in Kootenays: opportunities within the East and West Kootenays to market value added products."

Choosing Creston

Respondents frequently cited the appeal of the community for raising a family, their long standing ties to the community, the quality of the land, and the overall growing conditions for agricultural related purposes.

Other Locations

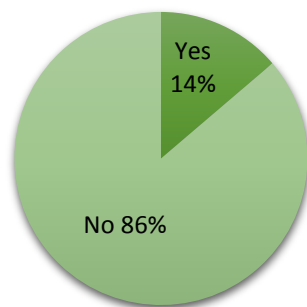


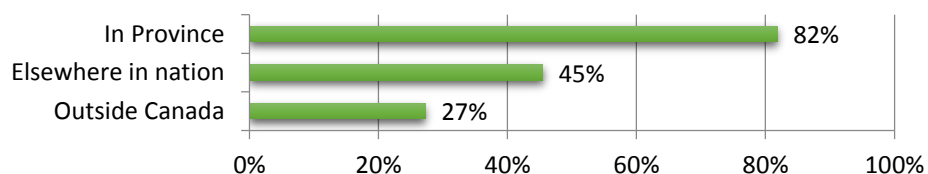
Figure 5: Other Locations

14% of respondents (11 respondents) indicated that their company has other locations.

Note: 80 respondents

82% of those other locations (9 respondents) are in other areas of the province, 45% (5 respondents) are in other parts of Canada.

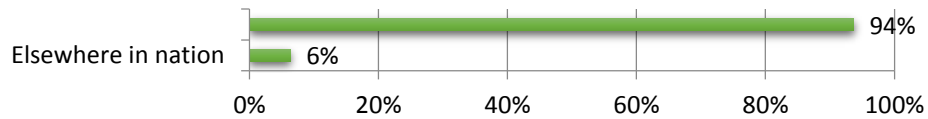
Figure 6: Location of Other Locations



Note: 11 respondents

94% (74 businesses) of respondents reported that their headquarters are located in British Columbia, and the remaining 6% (5 businesses) indicated that they are headquartered in other parts of Canada.

Figure 7: Location of headquarters

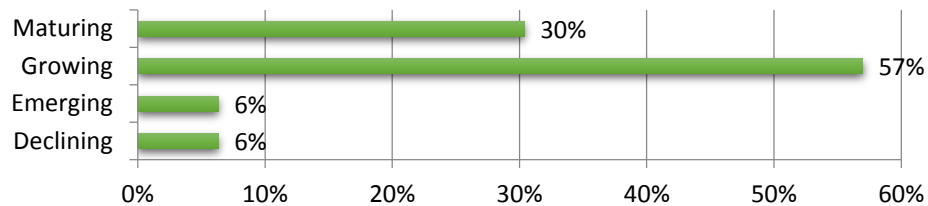


Note: 79 respondents

Age and Life Cycle Stage

Over half of all respondents (57% or 45 respondents) reported that their business is in the 'growing' life cycle stage. Another 30% (24 businesses) indicated that their business is in the 'maturing' stage. Only 6% (5 businesses) indicated that they are in the 'emerging' stages, while an additional 6% (5 businesses) indicated they were declining.

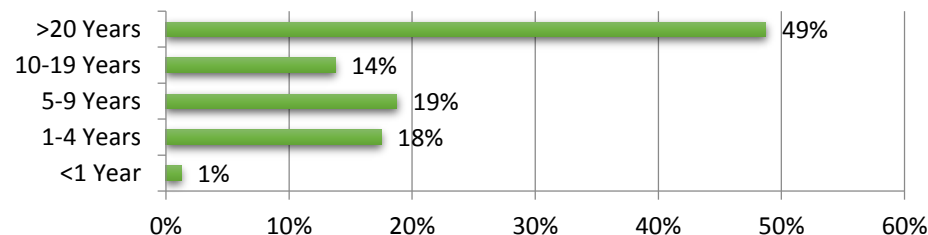
Figure 8: Life cycle stage



Note: 80 respondents

Most businesses (39 respondents or 49%) reported that they have been in business for more than 20 years. A significant number reported that they have been in business for 10 - 19 years (11 respondents or 14%), 5 - 9 years (15 respondents or 19%), and 1 - 4 years (14 respondents or 18%).

Figure 9: Length of time in business

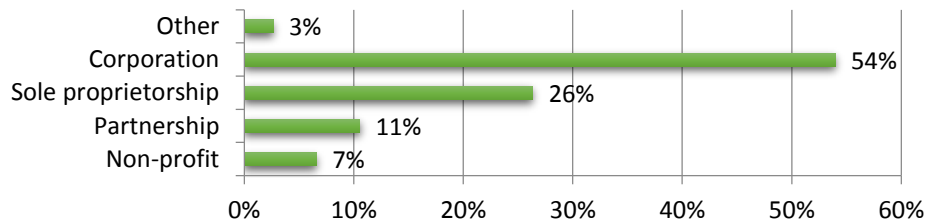


Note: 80 respondents

Ownership and Management

93% of all companies are privately owned, with just 7% publicly owned. Most respondents (41 respondents or 54%) indicated that their business is classified as a corporation, while 26% (20 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (11% or 8 respondents), non-profit (7% or 5 respondents), or other type of business (3% or 2 respondents).

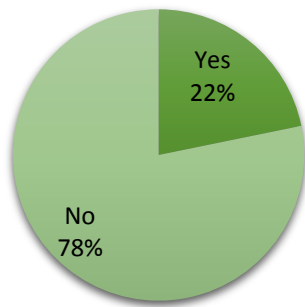
Figure 10: Type of business



Note: 80 respondents

Figure 11: Ownership and management changes in last 5 years

78% of businesses (61 businesses) have not seen a management or ownership change in the last 5 years, while 22% of businesses (17 businesses) have changed management and/or ownership over that same period of time. Just 4% of businesses (3) are expecting an ownership change in the near future. Of the 17 respondents that have seen changes in management and or ownership, 71% (12 businesses) report that the change had a positive impact.

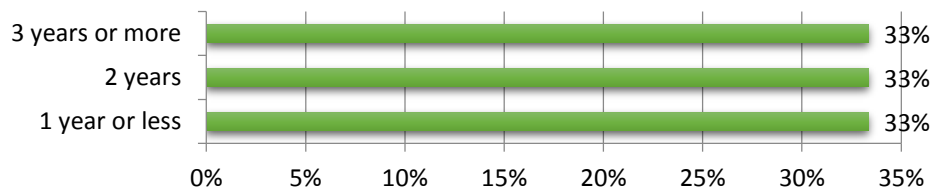


Note: 80 respondents

Succession and Business Plans

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

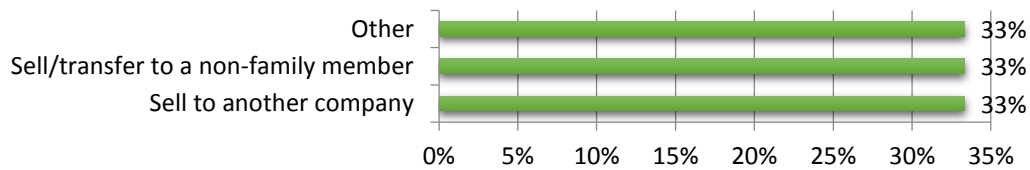
Figure 12: Anticipated timeline for ownership change



Note: 3 respondents

33% of respondents (1 respondent) expect that the current owner will exit the business by selling it to another company, while 33% (1 respondent) expect it to be sold/transferred to -family member. 33% (1 business) expect to return shares to the co-op for resale.

Figure 13: Anticipated exit strategy



Note: 3 respondents

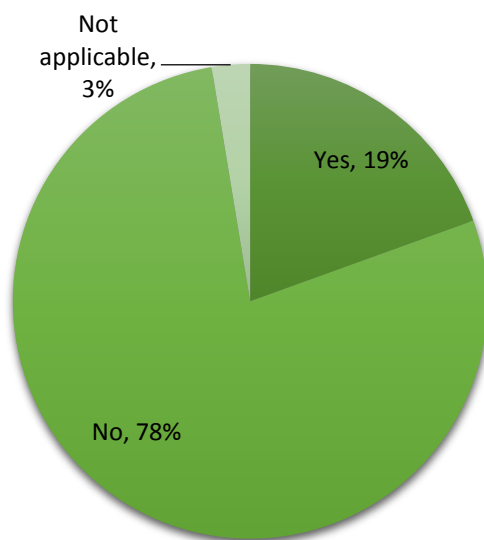


Figure 14: Existence of formal succession plan

Only 19% (15 respondents) of businesses reported that they have a formal succession plan in place, and just 26% have identified a successor for their business. Of those that completed a succession plan, 75% received assistance in its preparation.

Note: 77 respondents

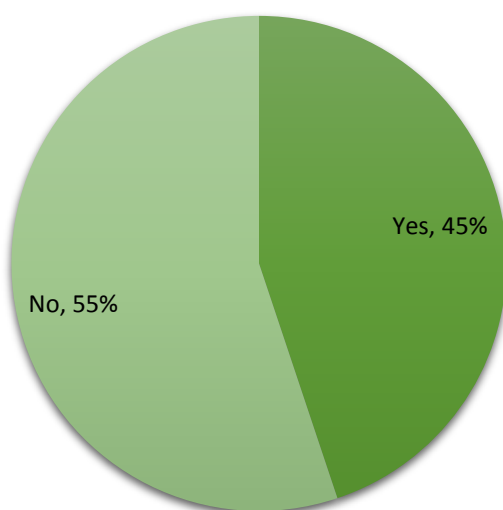


Figure 15: Existence of current business plan

Less than half of all respondents (45% or 35 respondents) indicated that they have a business plan in place.

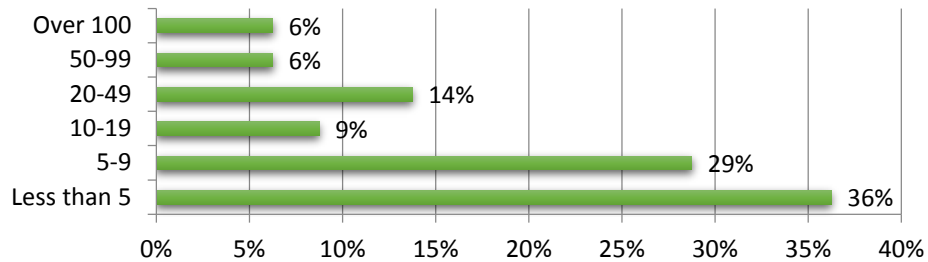
Note: 78 respondents

LOCAL WORKFORCE

Size of Workforce

The 80 businesses interviewed reported a total of 1,711 employees. 36 % or 29 of the businesses surveyed indicated that they have less than five employees and just 6% or 5 of the businesses indicated that they have over 100 employees.

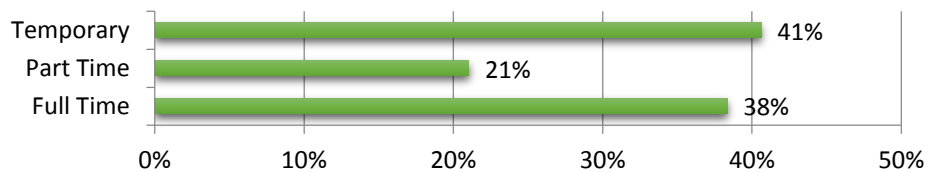
Figure 16: Total number of employees



Note: 80 respondents

41% (695) of employment positions at surveyed businesses are temporary, while 38% (656) are full-time and 21% (360) are part-time.

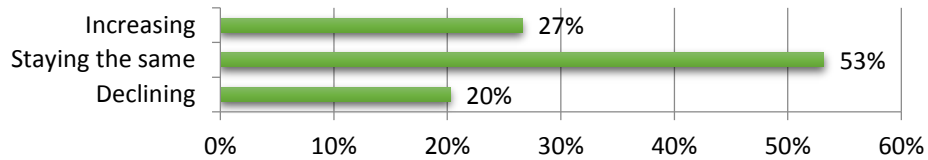
Figure 17: Nature of employment



Note: 80 respondents

53% of respondents (42 businesses) indicated that the number of employees at their business has stayed the same historically. While 27% (21 businesses) indicated that the size of their workforce has increased. 20% (16 businesses) indicated a decrease.

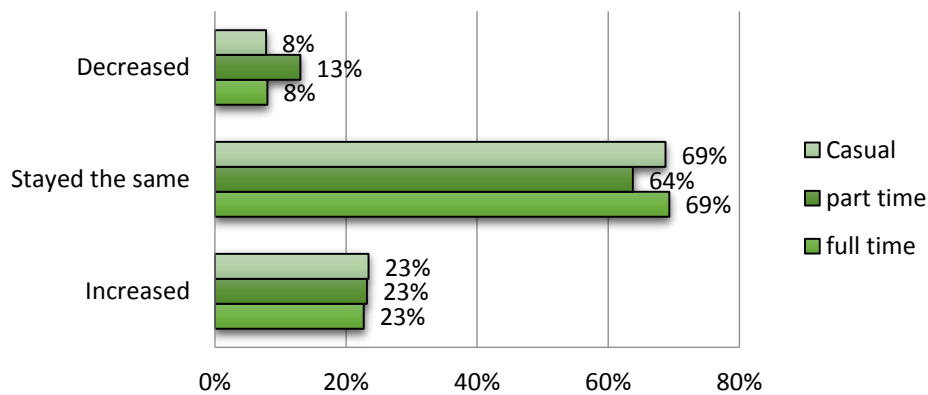
Figure 18: Historical Employment trend⁴



Note: 79 respondents

The last three years has generally seen stability in the size of the full-time workforce, with 69% of businesses (52 respondents) reporting that the number of employees has stayed the same, and 23% (17 respondents) reporting that full-time employment over that three year time period has increased. Interestingly the employment trend for full-time, part-time, and casual employment was consistent over the previous three years.

Figure 19: Employment trend over last 3 years

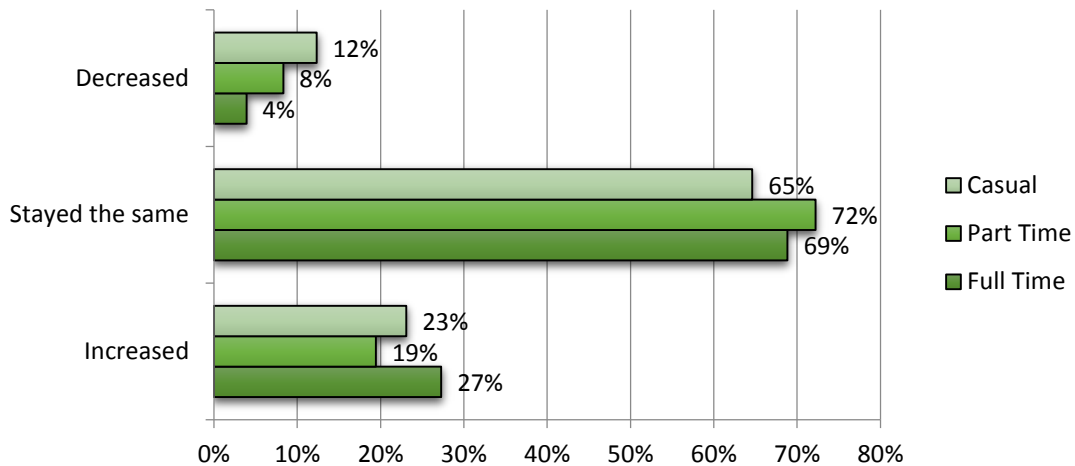


Note: #of respondents varies

⁴ The question considered a 10 year historical trend.

Trends for full time, part time and casual employment were consistent. 69% of businesses (53 respondents) interviewed expect the size of their full-time workforce will stay the same over the next 3 years, with 65% indicating their casual work force will stay the same.

Figure 20: Employment trend over next 3 years

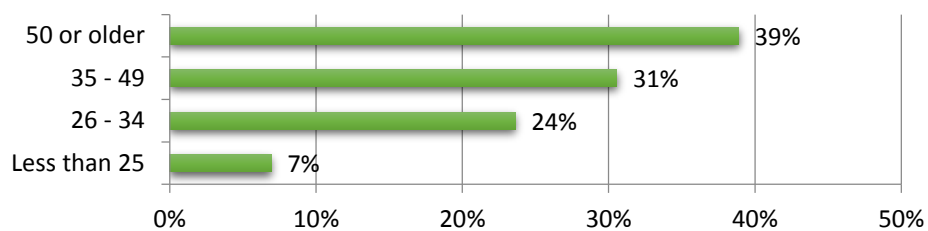


Note: #of respondents varies

Workforce Demographics

39% (28 respondents) indicated that the majority of their essential employees are over 50 years old. 31% (22 respondents) of businesses indicated that their workforce is between 35 and 49, and just 7% (5 businesses) have a workforce under the age of 25.

Figure 21: Age of the majority of essential employees



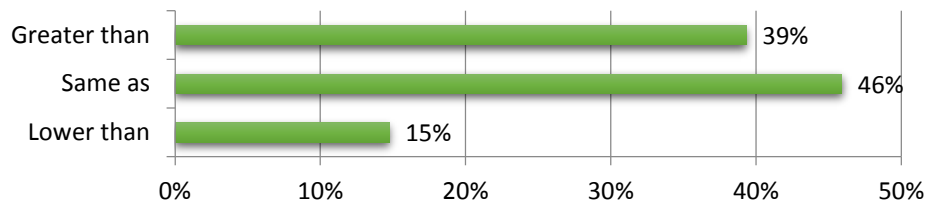
Note: 72 respondents

Wages

When reporting on average wages for skilled or professional workers, the majority of responses indicated they pay between \$20 and \$29 per hour (32% or 16 businesses) and between \$15 and \$19 per hour (32% or 16 businesses). The most commonly reported average hourly wage for semi-skilled workers (31% or 12 businesses) was between \$15 and \$19 and the most commonly reported average wage for entry-level workers (66% or 25 businesses of respondents) was

between \$10 and \$12. 46% of respondents (28 respondents) reported that their wage scale is similar to other businesses in the region⁵.

Figure 22: Wages in relation to other businesses in the region

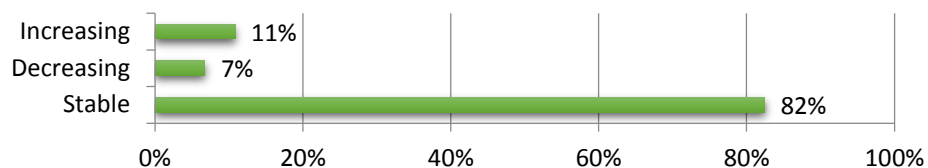


Note: 61 respondents

Recruitment and Retention

Of those businesses that responded, 82% (61 respondents) indicated that the number of unfilled positions at their company would remain constant.

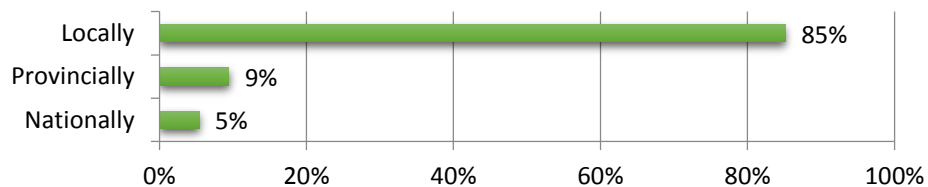
Figure 23: Trend in unfilled positions



Note: 74 respondents

The vast majority of respondents (85% or 63 respondents) reported that they primarily recruit employees from local labour markets. 9% (7 respondents) recruit provincially, while 5% (4 respondents) report that they recruit at the national level. International recruitment was not identified by the respondents.

Figure 24: Location of workforce recruitment

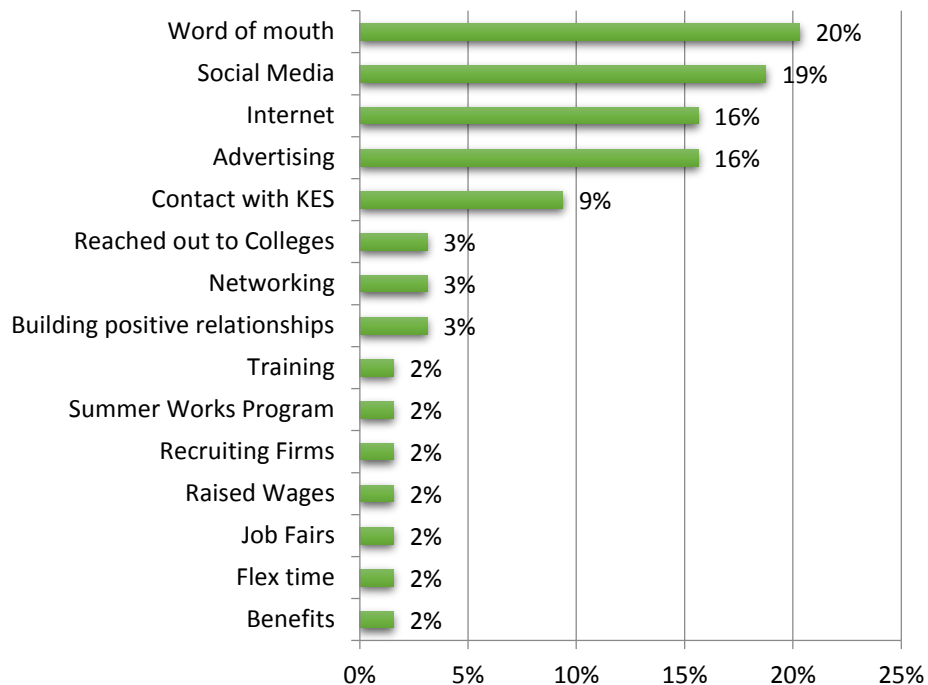


Note: 74 respondents

⁵ Detailed wage data is found in Appendix A.

When asked what efforts businesses have undertaken to recruit employees, the efforts that emerged most often were word of mouth (20% or 13 respondents), social media (19% or 12 respondents), internet (16% or 10 respondents), and advertising (16% or 10 respondents). Respondents also cited using a wide variety of other means, including contact with Kootenay Employment Services (KES), contact with the College, and networking.

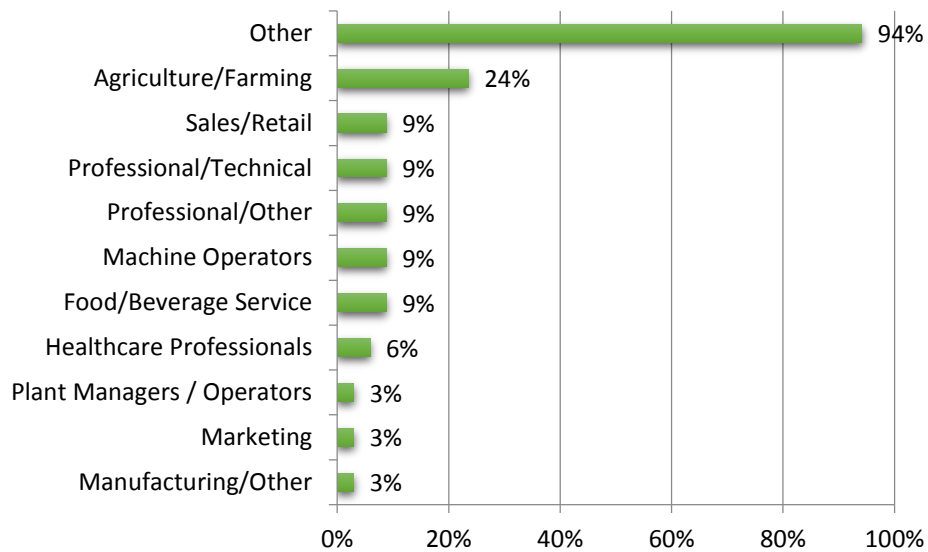
Figure 27: Recruitment Activities



Note: 64 respondents

Of the 34 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include agriculture/farming related (24% or 8 respondents), sales/retail, professional/technical, machine operators, and food/beverage service (cited by 9% or 3 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

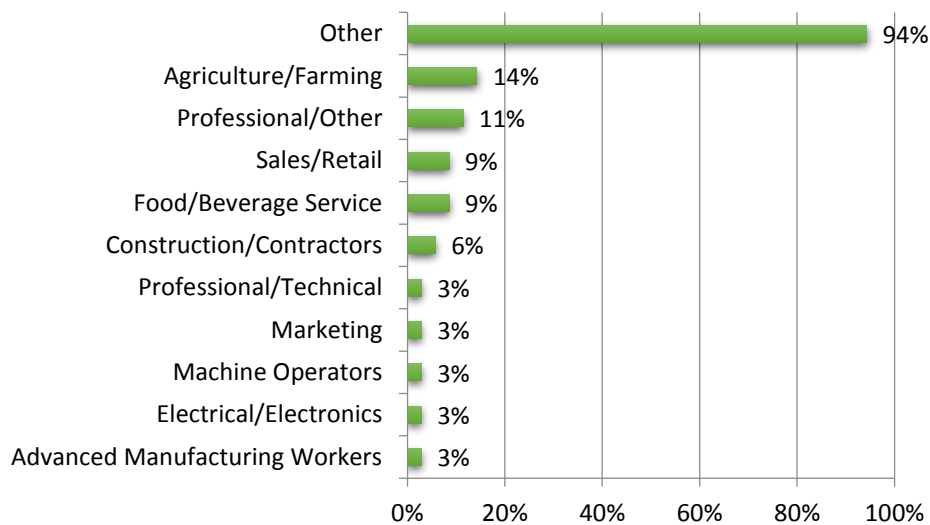
Figure 28: Current recruitment areas



Note: 34 respondents

46% of respondents (35 businesses) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include agriculture/farming (14% or 5 respondents) and professional/other (11% or 4 respondents).

Figure 29: Future areas where recruitment may be challenging

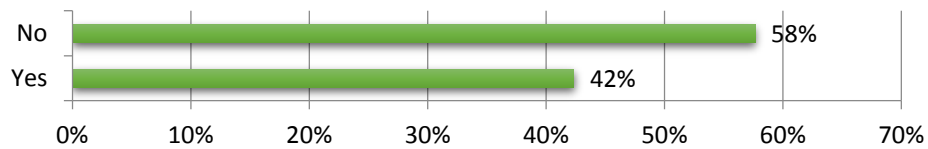


Note: 35 respondents

37% of respondents (25 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. 24% (6 respondents) believed that

advertising could be effective, while 16% (4 respondents) suggested training, and another 16% (4 respondents) suggested subsidizing wages.

Figure 30: Strategies to overcome employee recruitment challenges

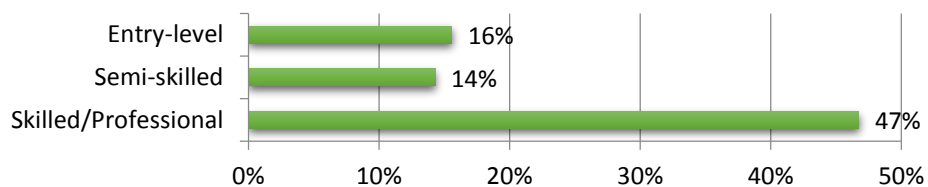


Note: 67 respondents

Skills and Training

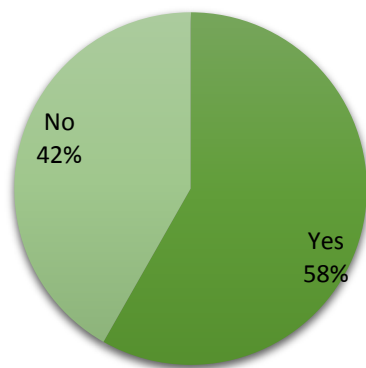
The majority of respondents (47%) indicated that over half of their workforce is comprised of skilled or professional workers, 14% indicated that their workforce is mainly semi-skilled workers, and 16% indicated that entry-level workers make up the majority of their workforce.

Figure 31: Skill level of majority of workforce



Note: # of respondents varies

Figure 32: Training Budget

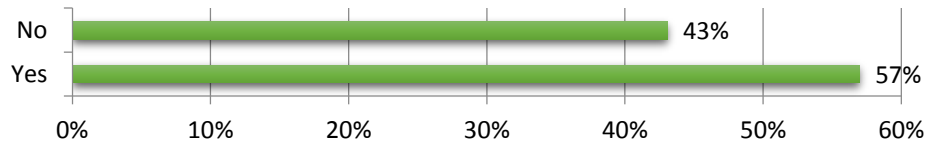


58% (46 businesses) indicated that there is a training budget to upgrade employee skills. 86% (68 businesses) indicated that their company offers in-house training, and 45% (35 businesses) use contracted training.

Note: 79 respondents

57% of respondents (45 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

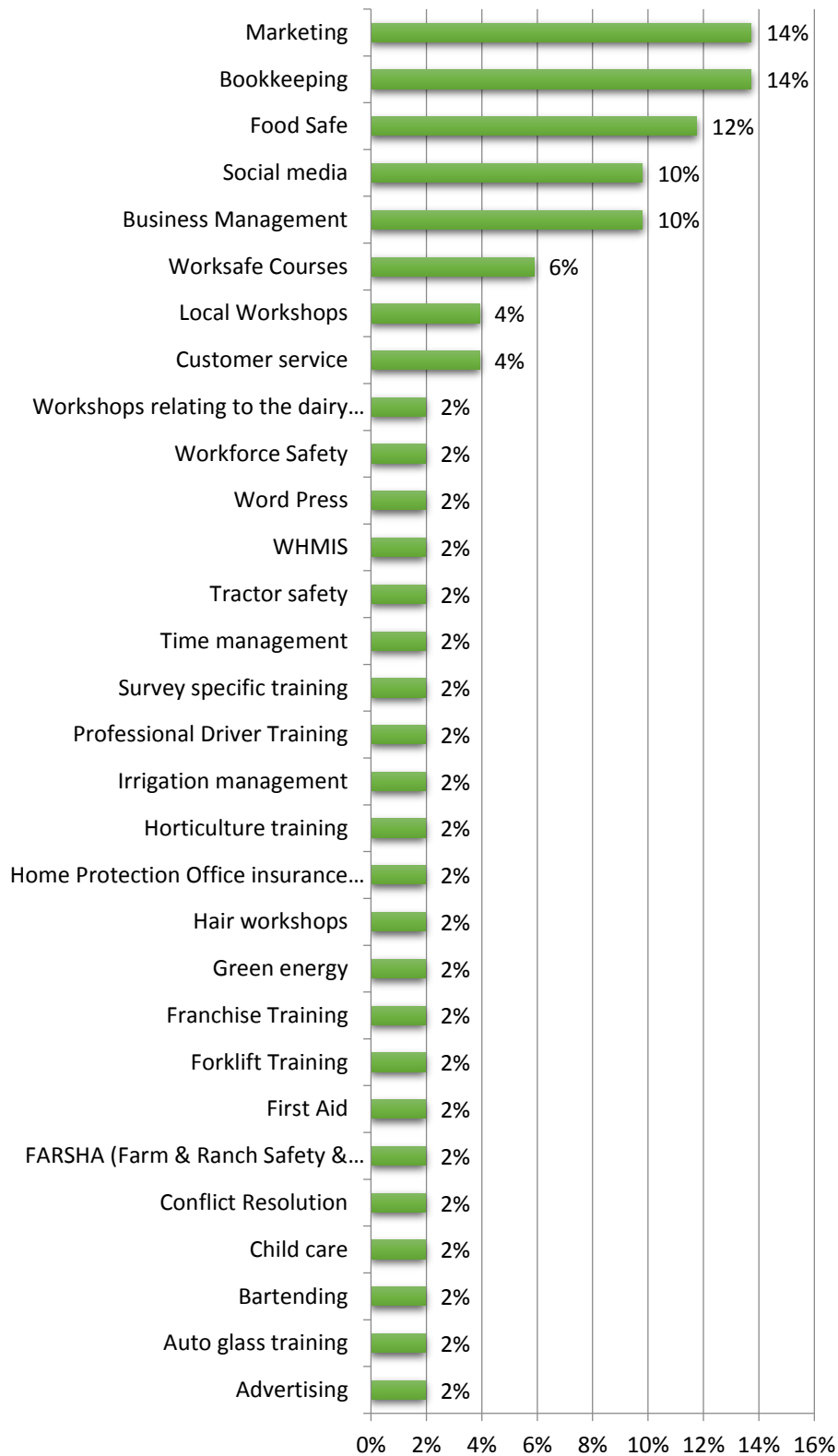
Figure 33: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 79 respondents

65% or 52 respondents indicated that there are areas of training or professional development that would be of benefit. Most commonly listed among these areas were marketing skills (14% or 7 businesses), bookkeeping (14% or 7 businesses), and food safe (12% or 6 businesses).

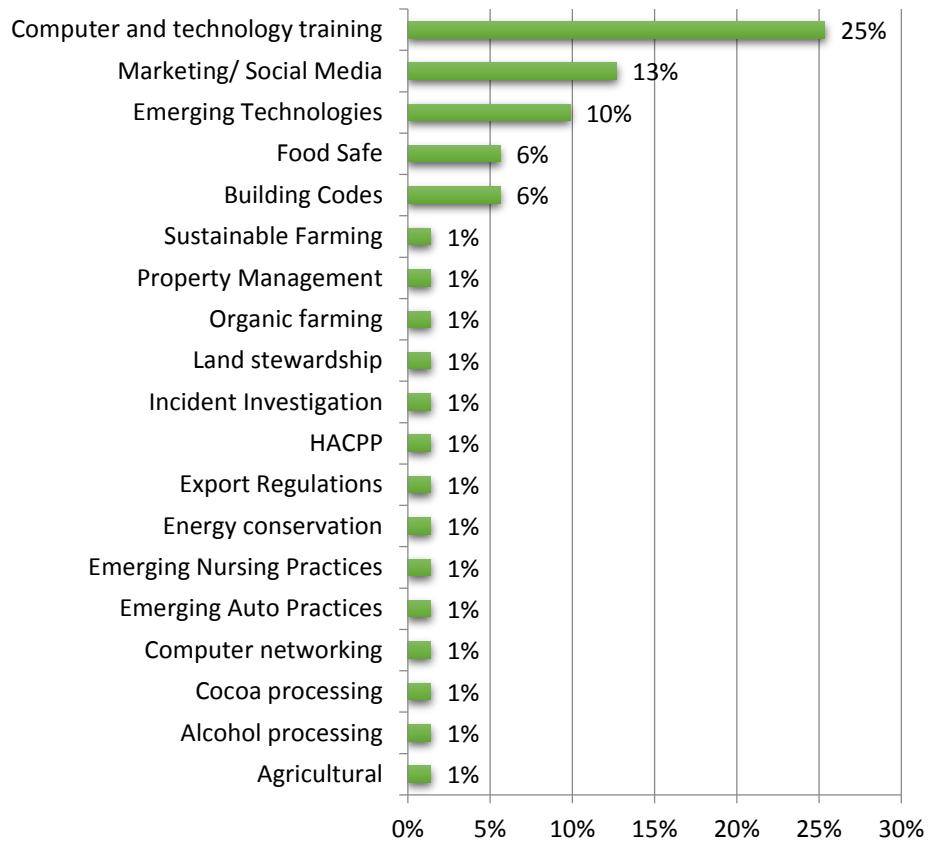
Figure 34: Training or professional development needs



Note: 51 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 (25% or 18 businesses), marketing/social media (13% or 9 businesses), and emerging technologies (10% or 7 businesses).

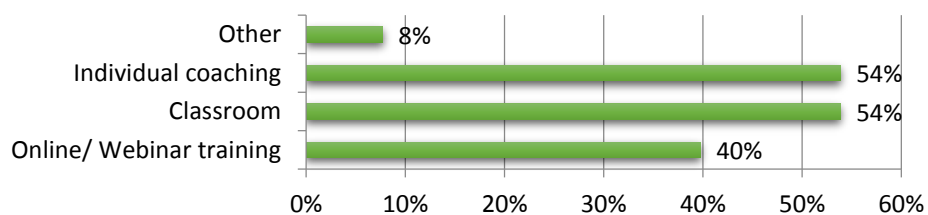
Figure 35: Areas for new Training in next five years



Note: 71 respondents

54% of respondents (42 businesses) stated that they prefer training when it is delivered through individual coaching and/or a classroom setting, while 40% (31 businesses) preferred an online/webinar format.

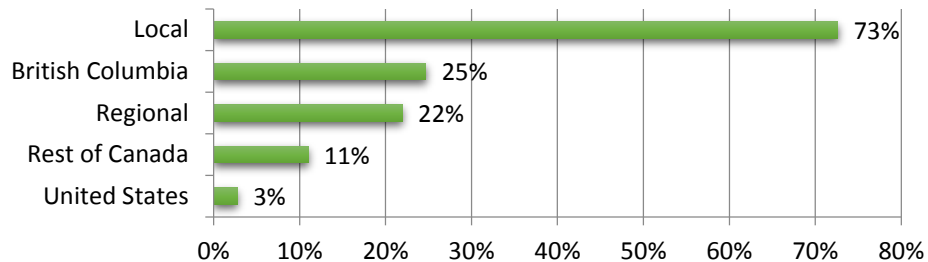
Figure 36: Preferred modes of training



Note: 78 respondents

73% of respondents (53 businesses) typically seek training opportunities that are offered locally, and 25% (18 businesses) travel to other areas in the province for their training. Fewer training opportunities are sought elsewhere in the region, country, or in the United States.

Figure 37: Usual training locations



Note: 73 respondents

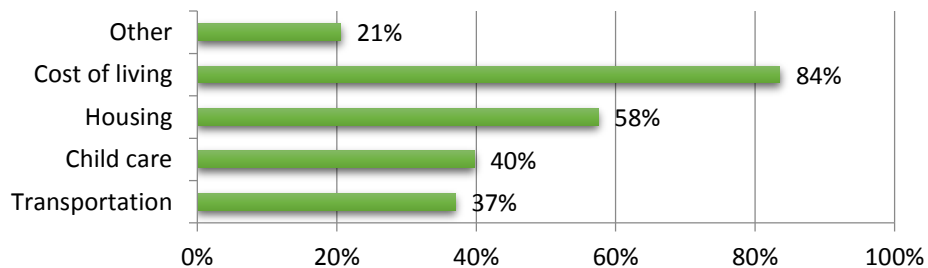
Unions

11 businesses (14%) reported that they have union status.

Employees

The most frequently cited critical issues for employees are the cost of living (84% or 61 businesses) and housing (58% or 42 businesses). Child Care (40% or 29 businesses) and transportation (37% or 27 businesses) issues were also cited. For a list of factors included in the “other” category charted below, refer to Appendix A.

Figure 38: Critical considerations for employees



Note: 73 respondents

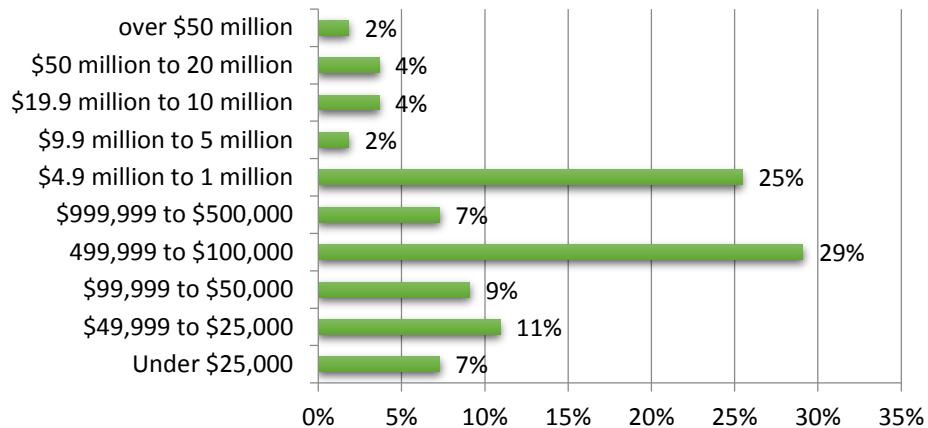
92% of businesses (72 businesses) interviewed reported that over 75% of their employees live within the community, 8% (1 business) indicated that 75% of the employees live elsewhere in the region and 20% (2 businesses) indicated that their workforce lives outside of the region.

SALES

Market Size and Share

The highest number of respondents (16 businesses or 29%) reported annual sales between \$100,000 and \$499,000. The second highest number of respondents (14 businesses or 25%) reported annual sales of between \$1 million and \$4.9 million. The lowest number (1 business or 2%) reported sales of over \$50 million.

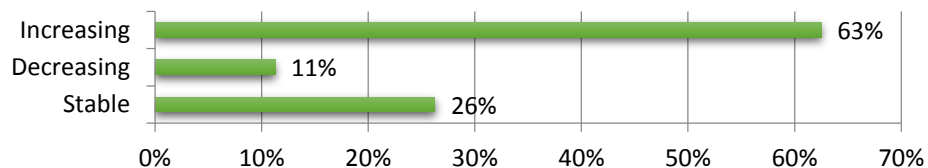
Figure 39: Annual sales



Note: 55 respondents

The majority of businesses interviewed (63% or 50 businesses) indicated that the size of the market for their product or service is increasing. Another 26% (21 businesses), reported that the market is stable.

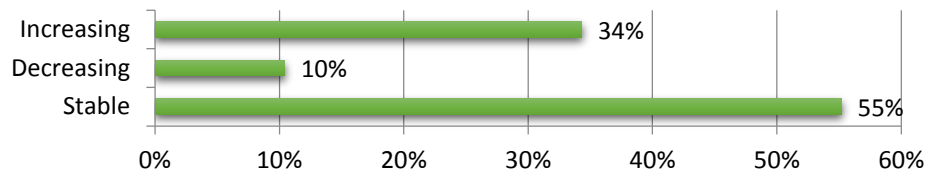
Figure 40: Status of market for product/service



Note: 80 respondents

55% (37 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is stable, while 34% (23 businesses) indicated that it is increasing. A small number of respondents (10% or 7 businesses) indicated that their market share is decreasing.

Figure 41: Market Share in Comparison to Competitors

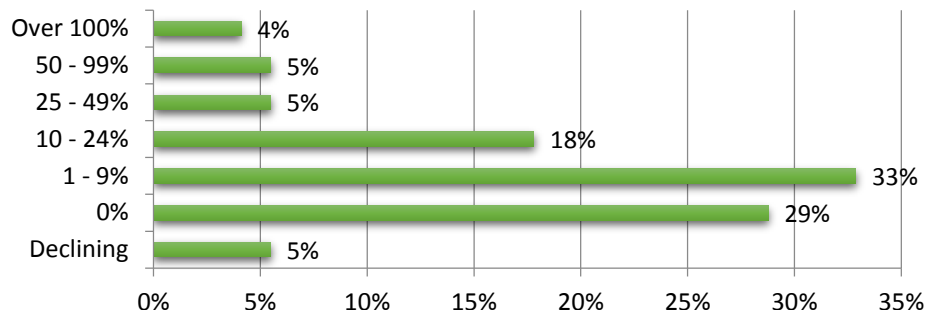


Note: 67 respondents

Growth

33% of respondents (24 businesses) expect to see low growth in sales in the realm of 1 – 9%. Moderate growth in sales of 10-24% over the next year is projected by 18% of respondents (13 businesses). A combined 14% (total of 11 businesses) expect strong sales growth of over 25%. 29% (21 businesses) of respondents expect their sales to remain stagnant, while a further 5% (4 businesses) expect sales to decline.

Figure 42: Projected sales growth in the next year



Note: 73 respondents

The majority of responses (64% or 49 businesses) indicated that sales at their business have increased over time, 24% (18 businesses) indicated that sales have remained relatively stable, and 11% (8 businesses) reported that sales have declined.

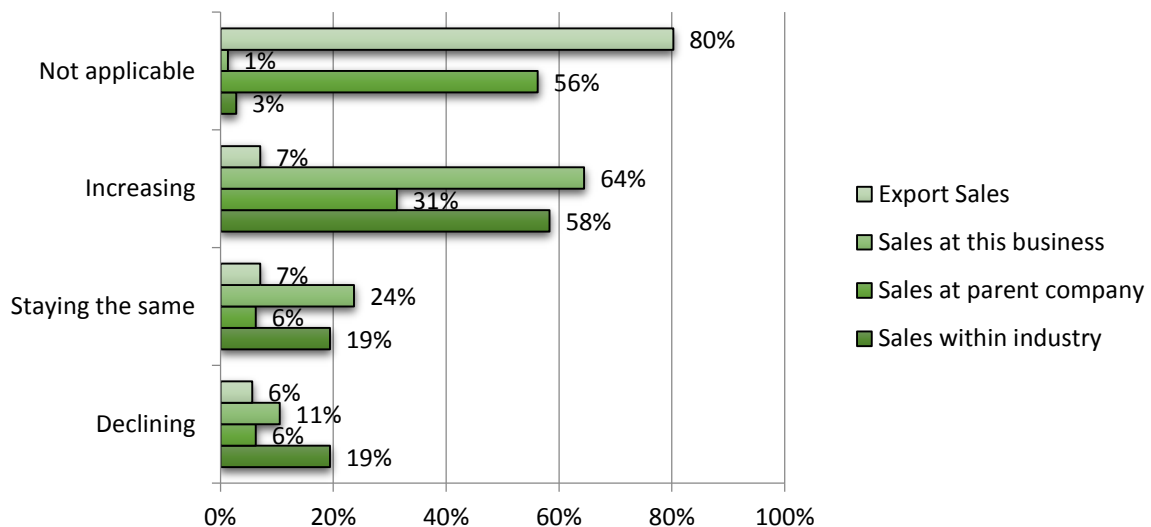
31% or 5 businesses reported that sales at their parent company have historically increased, 6% (1 business) reported that they have stayed the same, and 6% (1 business) reported a decline. It is worth noting that only 16 respondents answered this question, and of those 56% found the question not applicable.

Data indicates that the sales trend within respondents' respective industries has more closely followed the sales trend reported at the location rather than the parent company. 58% percent of

respondents (42 businesses) reported that sales within their industry have been increasing while 19% (14 businesses) reported that they have been decreasing, and an additional 19% (14 businesses) indicated sales in their industry are declining.

Of the 14 businesses that reported exporting to international markets, 7% (5 businesses) indicated that their export sales have been increasing, 7% (5 businesses) indicated that they have been stable, and 6% (4 businesses) reported export sales are in decline.

Figure 43: Historic sales trend

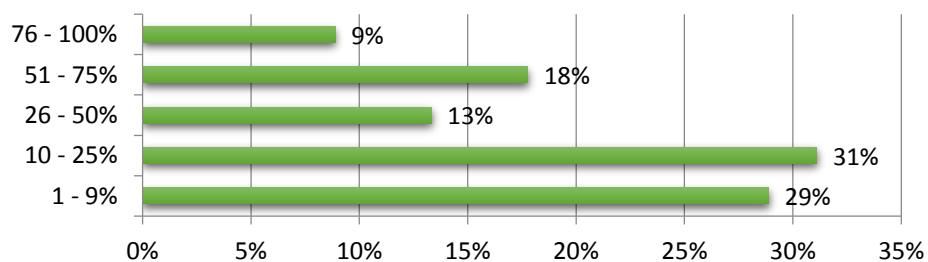


Note: #of respondents varies

Source of Sales

The customer base among Creston businesses appears to be fairly reliant on a diverse customer base, with the largest percentage of respondents (31% or 14 businesses) indicating that 10 – 25% of their sales are generated by their top three customers. There does appear to be some reliance on a core customer as indicated by the 9% of respondents (4 businesses) that indicated that between 76 – 100% of their sales are generated by their top three customers.

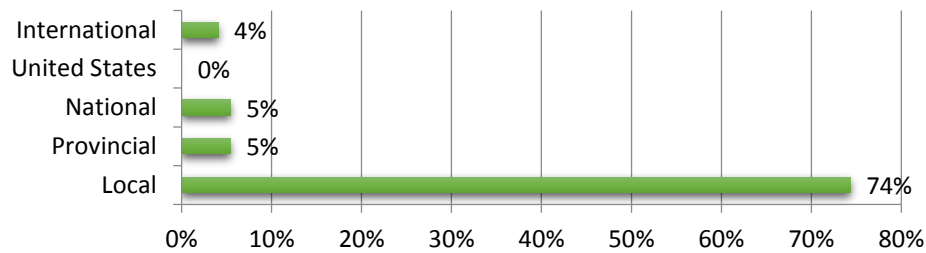
Figure 44: Sales generated by top three customers



Note: 45 respondents

A majority of respondents (74%) 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 5% indicated the majority of sales to a national market. Fewer respondents indicated that the majority of their sales are to US or international markets (0% and 4% respectively). Additionally, when asked whether they supply products or services to any company in the community, 65% (51 respondents) indicated that they did.

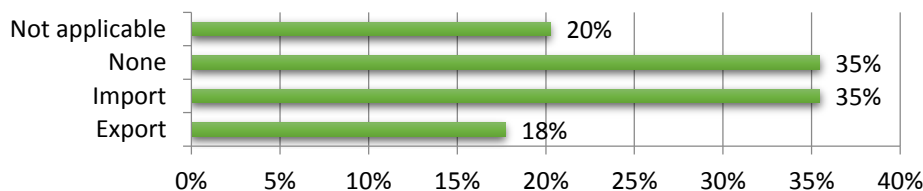
Figure 45: Geographic source of majority of sales



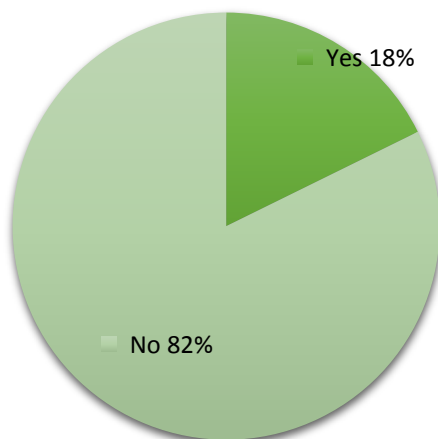
Note: # of respondents varies

28 respondents (35%) indicated that they import goods or services from other countries and 14 respondent (18%) indicated that they export goods or services to other countries. 55% of respondents did not find the question applied to them, or responded that they had no international trade status.

Figure 46: International trade status



Note: 79 respondents



Procurement

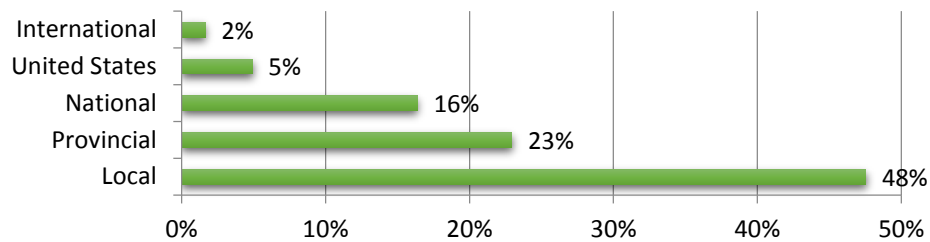
Figure 47: Engagement with government procurement processes

Only 18% (14 respondents) indicated that they engage in government procurement.

Note: 79 respondents

48% of respondents (29 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 23% (14 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 48: Geographic source of majority of supplies

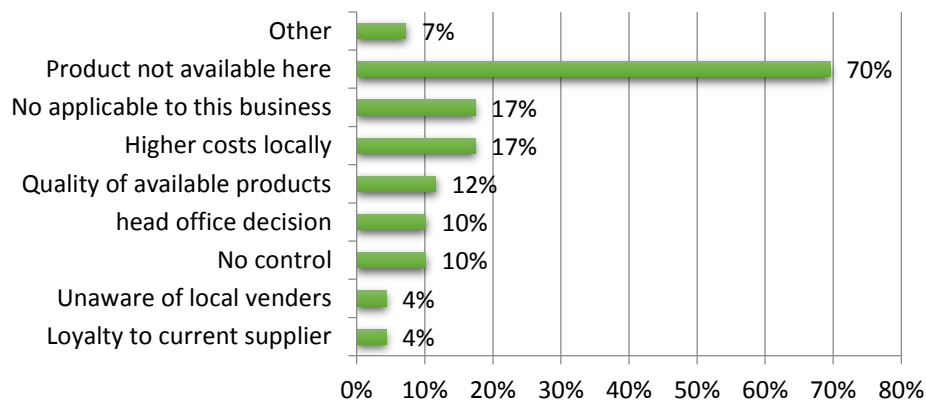


Note: # of respondents varies

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (70% or 48 businesses) indicated that the products they need are not available locally.

Figure 49: Reason for out-of-area purchasing



Note: 69 respondents

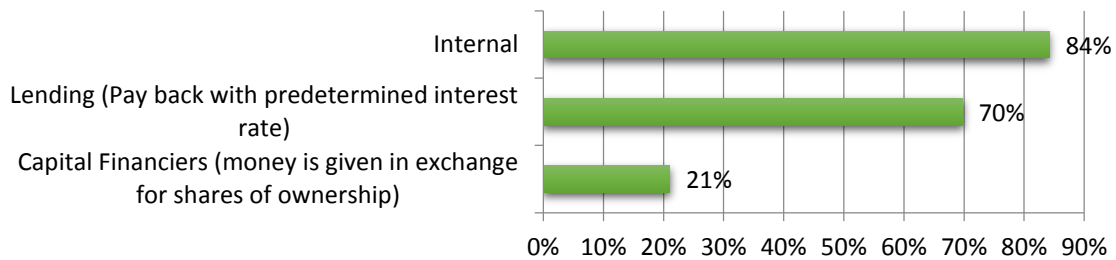
The most commonly referenced products that businesses stated they would like to source from a local supplier include farming supplies, produce, and packaging supplies.

Financing

Businesses accessed internal funding (84% or 64 businesses) most frequently when capital was required to meet needs. Loans were also frequently accessed with 70% of businesses (53 respondents) indicating that they had accessed this type of financing. Capital financing was accessed by 21% of respondents (16 businesses).

The type of internal financing was divided between personal savings (70% or 43 respondents) and retained earnings (70% or 43 respondents).

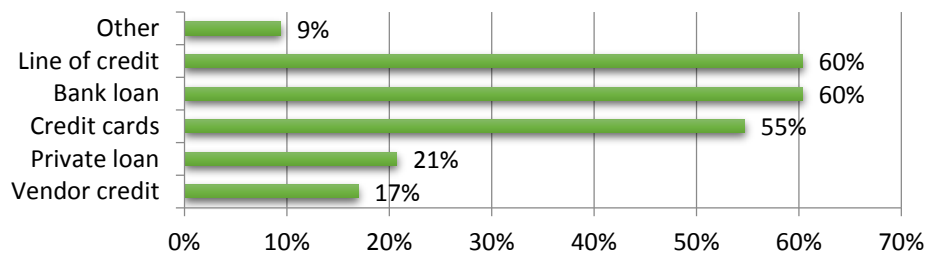
Figure 50: Types of Financing



Note: 76 respondents

Lending took many forms, with 60% of respondents (32 businesses) indicating that lending came from a line of credit. 60% (32 businesses) also indicated that a bank loan was accessed. 55% (29 businesses) made use of credit cards. Other forms of lending included private loans (21% or 11 respondents) and vendor credit (17% or 9 respondents).

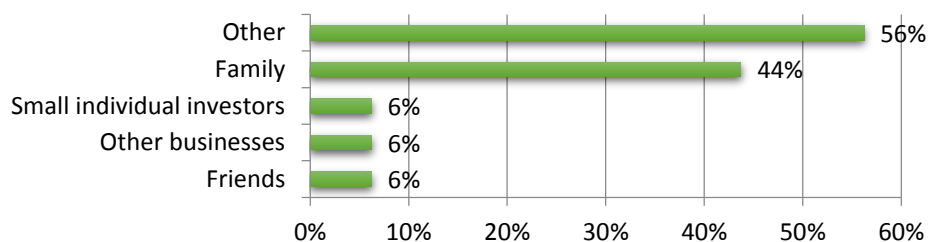
Figure 51: Types of Lending



Note: 53 respondents

Capital financing was most commonly accessed from family members (44% or 7 businesses), while small individual investors, other businesses, and friends were other sources (6% or 1 business respectively). 'Other' sources can be found in Appendix A.

Figure 52: Types of Capital Financing

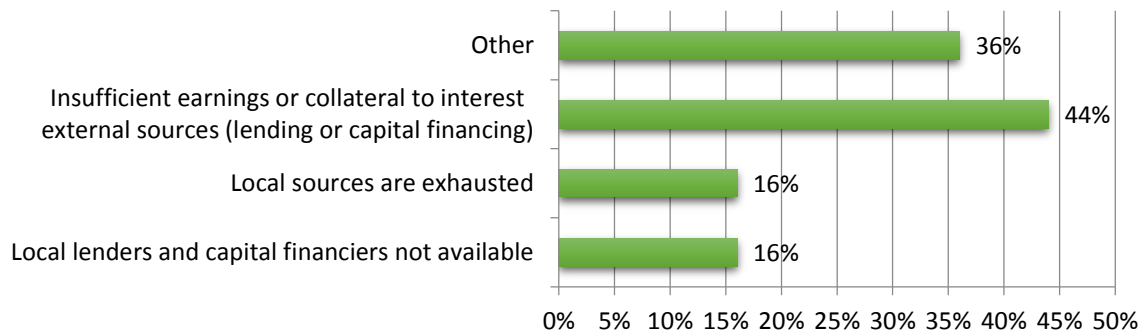


Note: 16 respondents

The most frequently cited barrier to accessing financial capital was insufficient earnings or collateral to interest external sources (44% or 11 businesses). The exhaustion of local sources and

the lack of available local lenders was also cited by 16% or 4 businesses respectively. Refer to Appendix A for list of 'Other' responses.

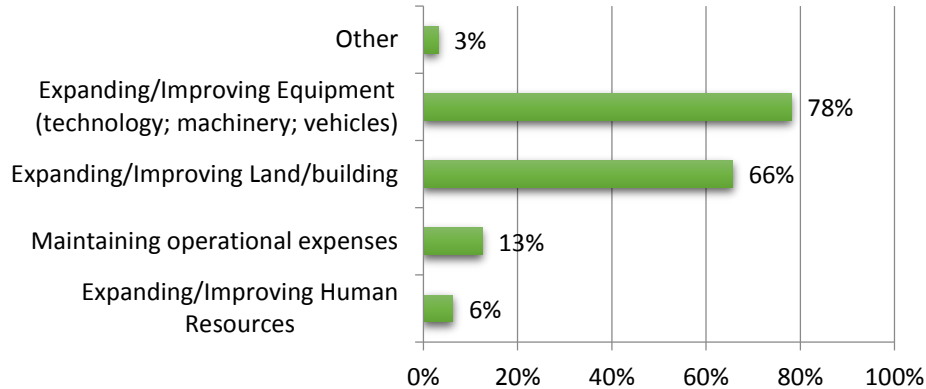
Figure 53: Barriers to Capital Financing



Note: 25 respondents

44% of businesses (32 respondents) indicated that they expect that they will need to access financial capital in the next 1 – 3 years. 78% (25 businesses) anticipate using financing to expand/improve equipment, while 66% (21 businesses) expect to expand/improve their building or land.

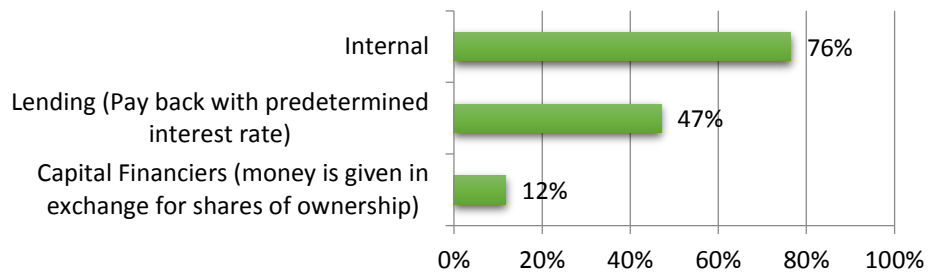
Figure 54: Purpose for Future Financial Capital Needs



Note: 32 respondents

48% of respondents (16 businesses) have not identified how they will access the desired financial capital in the coming years. Of the 52% (17 respondents) that have, 76% (13 respondents) will use internal sources, 47% (8 respondents) will access lending, and 12% (2 respondents) will access finances through capital financiers. Internal funding will come from two sources: personal savings (54% or 7 businesses) and retained earnings (77% or 10 businesses). Most lending sources will come from banks (66% or 5 businesses), with lines of credit (38% or 3 businesses) also frequently cited.

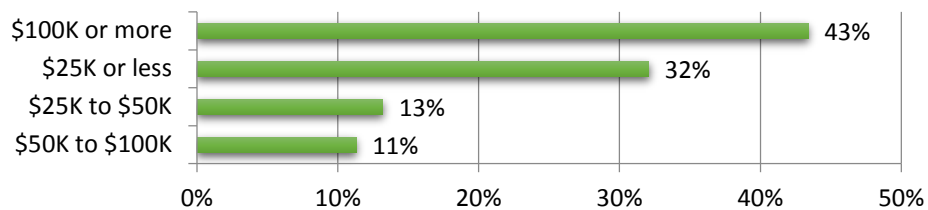
Figure 55: Source for Future Financial Capital Needs



Note: 17 respondents

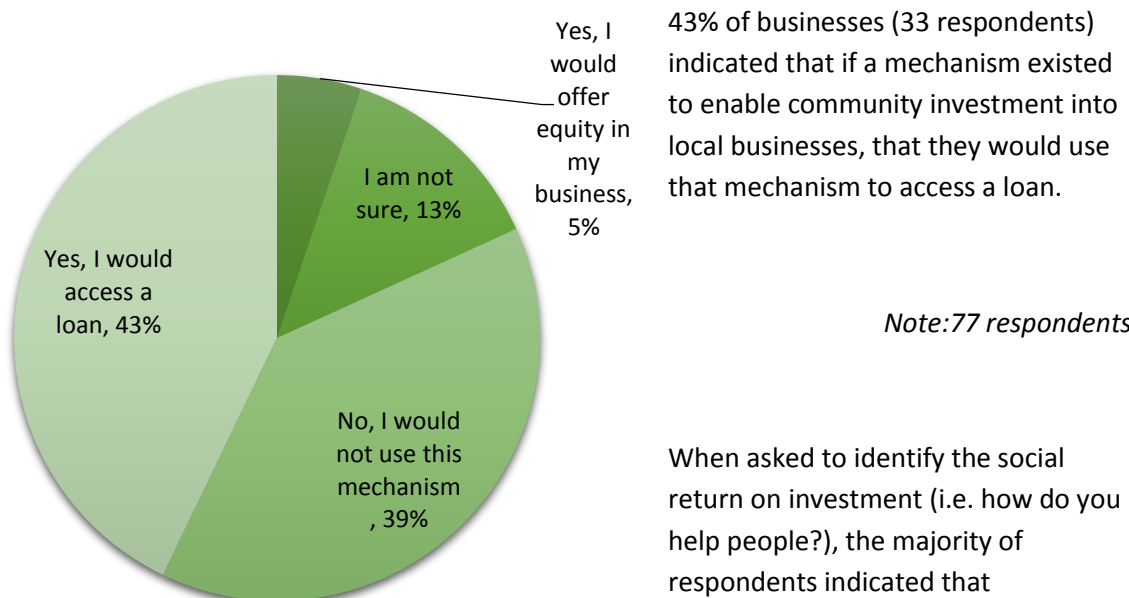
43% (23 businesses) of respondents were looking for over \$100,000 to meet their future capital needs, while 32% (Or 17 businesses) were looking for \$25,000 or less.

Figure 56: Future Capital Needs



Note: 53 respondents

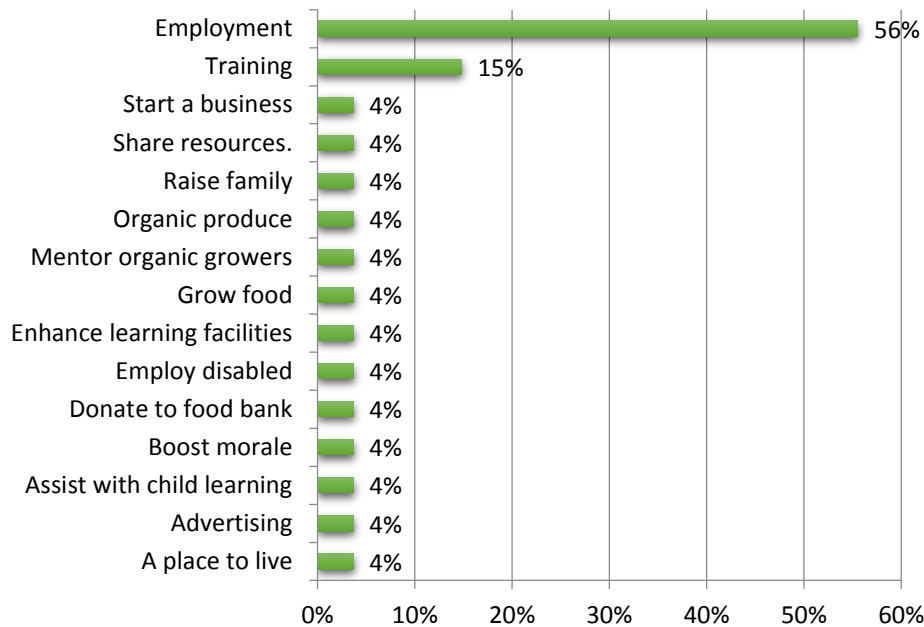
Figure 57: Community Investment Mechanism



Note: 77 respondents

employment was the single biggest social contribution.

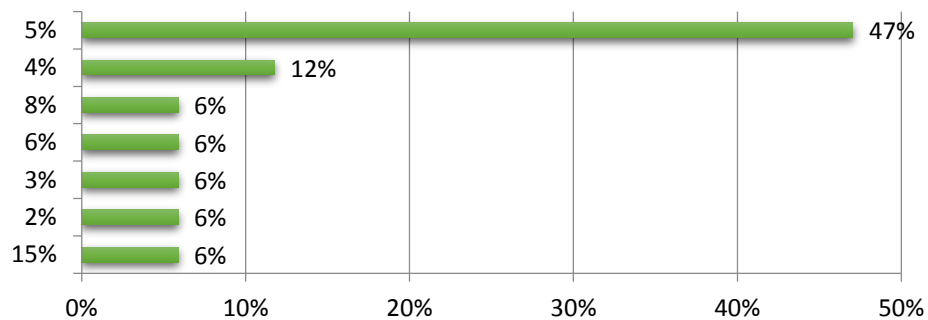
Figure 58: Return on Investment: Social



Note: 27 respondents

47% of respondents (8 businesses) indicated that they could offer a 5% return on investment.

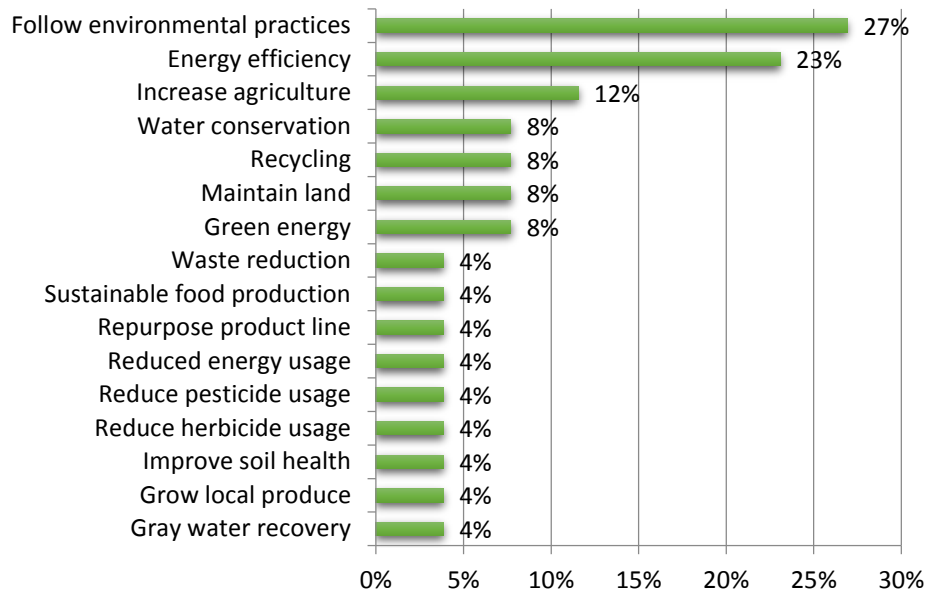
Figure 59: Return on Investment: Financial



Note: 17 respondents

Environmental benefits of an investment included: following environmental practices (27% or 7 businesses), energy efficiency (23% or 6 respondents), and increase agriculture (12% or 3 respondents).

Figure 60: Return on Investment: Environmental



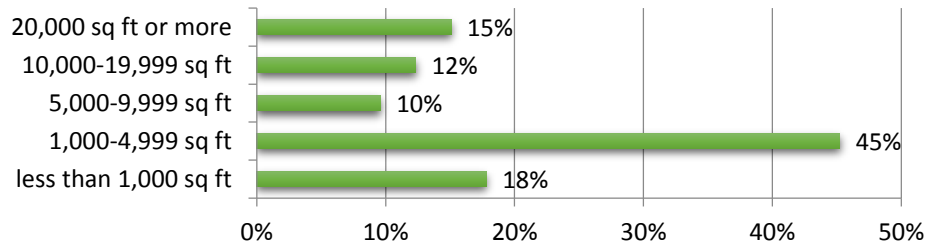
Note: 26 respondents

FACILITIES AND EQUIPMENT

Size and Condition

45% (33 businesses) of respondents reported that their facility is between 1,000 square feet and 4,999 square feet in size, and another 18% (13 businesses) indicated it was less than 1,000 square feet.

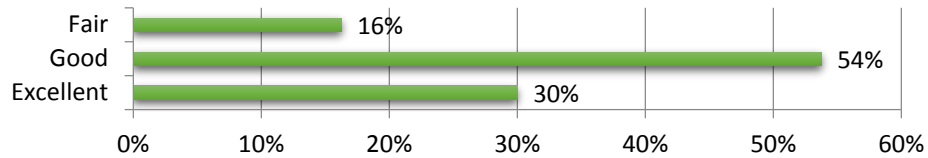
Figure 61: Size of facility



Note: 73 respondents

54% of respondents (43 businesses) indicated that their facility is in good condition. Another 30% (24 businesses) indicated that it is in excellent condition and 16% (13 businesses) reported that their facility is in fair condition. No businesses reported that their facility is in poor condition.

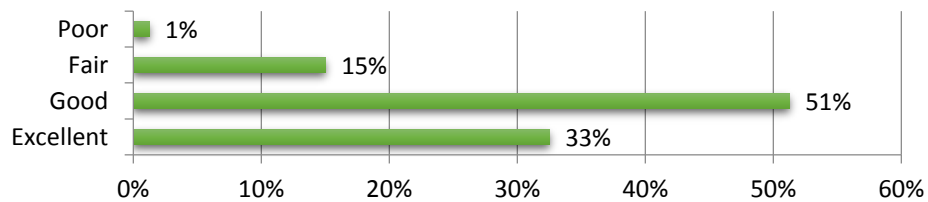
Figure 62: Condition of facility



Note: 80 respondents

51% (41 businesses) of respondents indicated that their equipment is in good condition. 33% (26 businesses) indicated that it is in excellent condition and 15% (12 businesses) report their equipment is in fair condition.

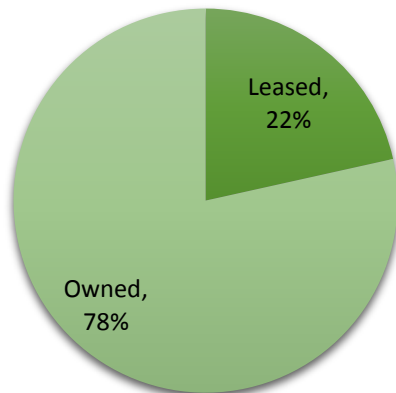
Figure 63: Condition of equipment



Note: 80 respondents

Ownership

Figure 64: Ownership status of facility

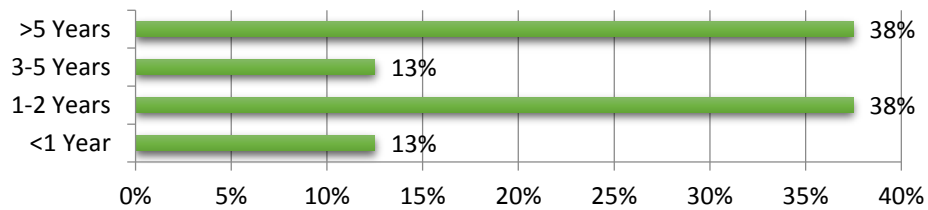


78% of respondents (62 businesses) own the facility in which they operate and 22% (17 businesses) lease it.

Note: 79 respondents

Of the 17 businesses that lease their facility, and provided a response to the question, 38% have between 1 and 2 years remaining on their lease and another 38% have over 5 years remaining. The majority of respondents that lease their facility (94% or 16 businesses) intend to renew their current lease agreement.

Figure 65: Length of time remaining on lease



Note: 17 respondents

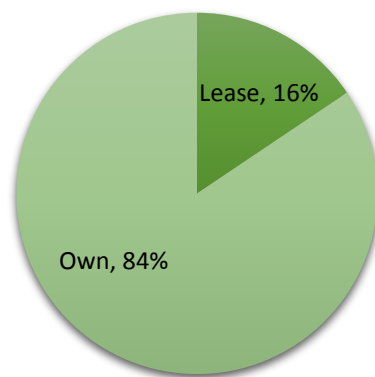


Figure 66: Ownership preference

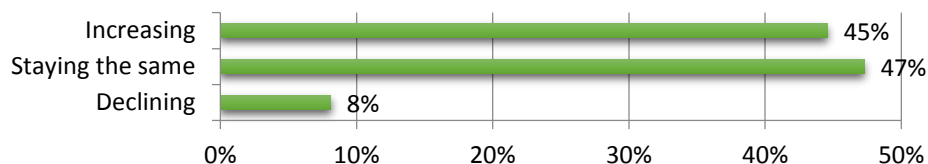
84% of respondents (65 businesses) would prefer to own their facility.

Note: 77 respondents

Investment and Expansion

47% of respondents (35 businesses) indicated that their company's investment in their facility has stayed the same over the past 18 months, while 45% (33 businesses), indicated that the investment has increased. Only six businesses (8%) indicated that investment in their facility has decreased over the same time period.

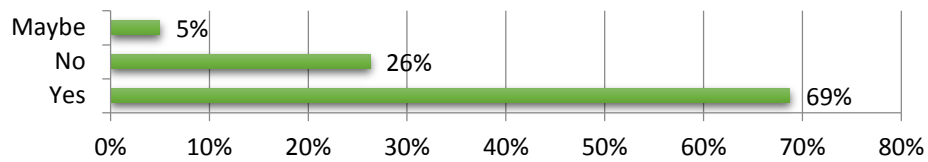
Figure 67: Historical Investment in facility (past 18 months)



Note: 74 respondents

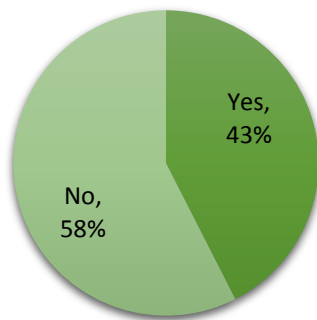
69% of respondents (55 businesses) indicated that there *was* room for expansion at their site, and 26% (21 businesses) indicated that there *was not* room at their site.

Figure 68: Room for expansion



Note: 80 respondents

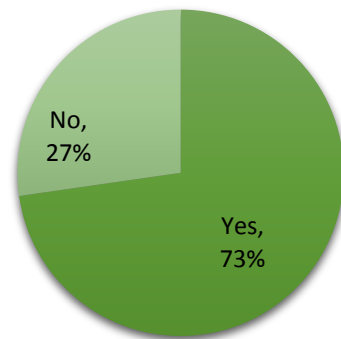
Figure 69: Plans to expand within three years



43% of respondents (34 businesses) plan to expand within three years, 58% (46 businesses) do not. Additionally, 41% (33 businesses) plan to expand in the next 12 – 18 months.

Note: 80 respondents

Figure 70: Adequacy of current site to support expansion

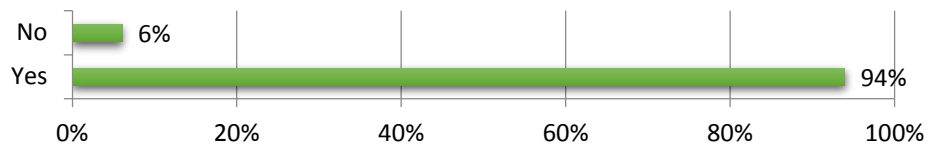


Of the 34 businesses planning expansion within the next three years, 73% (24 businesses) reported that their current site will be adequate. Notably however, 9 businesses (27%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 33 respondents

The vast majority of respondents (94% or 31 businesses) indicated that expansion will occur within the community.

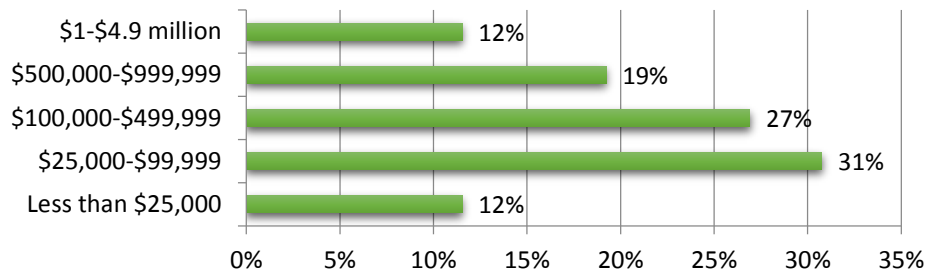
Figure 71: Expansion to occur in community



Note: 34 respondents

The total investment anticipated for the planned expansion plans ranges substantially. 31% (8 businesses) anticipate investing between \$25,000 and \$99,999, and an additional 27% (7 businesses) are planning larger investments in the range of \$100,000 to \$499,999.

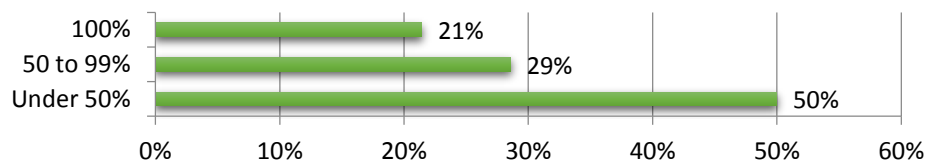
Figure 72: Estimated expansion investment



Note: 26 respondents

Of the 34 businesses planning expansion, 50% (14 businesses) responded to state that they expect to spend under 50% of their expansion budget on equipment and technology, while 29% (8 businesses) responded to indicate that 50% - 90% of their expansion budget will be devoted to equipment and technology.

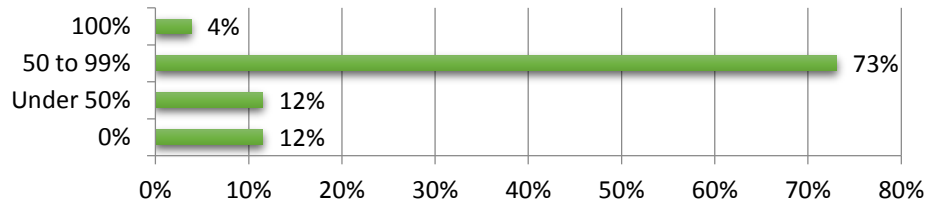
Figure 73: Component of expansion budget for equipment and technology



Note: 28 respondents

19 respondents (73% of businesses) expect to spend 50 - 99% of their expansion budget on real estate, while another 12% (3 businesses) expect to spend under 50% and 12% (3 businesses) of respondents will spend 0% of their expansion budget on real estate.

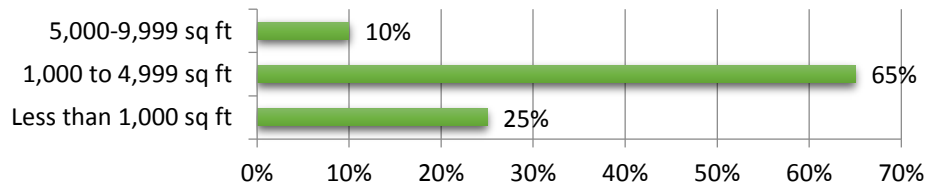
Figure 74: Component of expansion budget for real estate



Note: 26 respondents

65% (13 respondents) of businesses indicated that expansion plans will be between 1,000 and 4,999 square feet. 25% (5 respondents) of businesses anticipated an expansion of less than 1,000 square feet, while just two respondents (10%) expected an expansion of between 5,000 and 9,999 square feet.

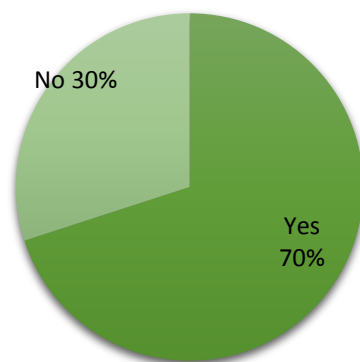
Figure 75: Size of facility expansion



Note: 20 respondents

Facility Upgrades

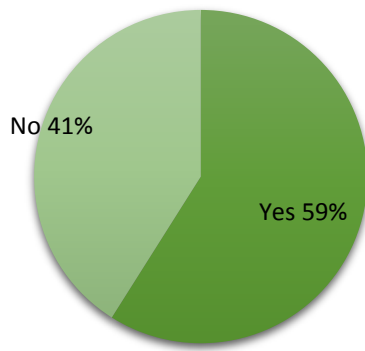
Figure 76: Recent facility upgrades



70% of businesses (56 businesses) indicated that there had been recent facility upgrades. Of those 56 businesses, 20% indicated that those upgrades were completed in the last 3 months, 6 months, and 12 months respectively.

Note: 80 respondents

Figure 77: Planning facility upgrades

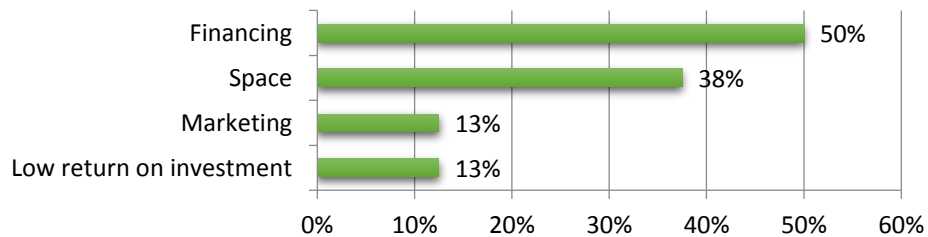


59% (46 businesses) indicated that they are planning facility upgrades, and that the majority (31% or 14 businesses) of those planning upgrades will occur in the next 12 months.

Note: 45 respondents

Respondents were also asked to identify any barriers to upgrading. The most frequently cited barrier was financial (50% or 4 businesses). Other factors cited include space, marketing, low return on investment.

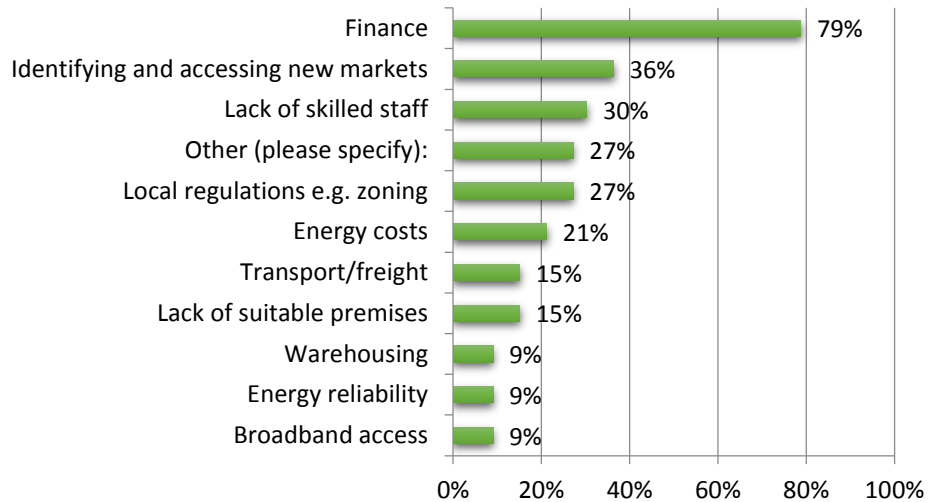
Figure 78: Barriers to upgrading



Note: 8 respondents

Respondents cited a variety of factors that act as constraints to their expansion. Most common of those were finance (79% or 26 businesses), identifying and accessing new markets (36% or 12 businesses), and lack of skilled staff (30% or 10 businesses).

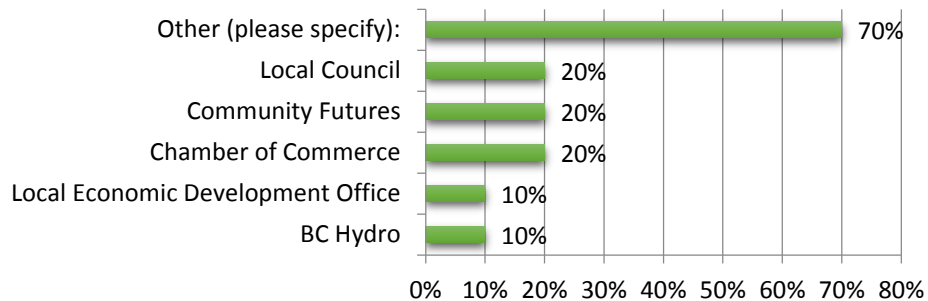
Figure 79: Barriers to expansion



Note: 33 respondents

Just 32% of respondents (11 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 (20% or 2 businesses), Community Futures (20% or 2 businesses), and the local Chamber of Commerce (20% or 2 businesses).

Figure 80: Organizations approached for expansion assistance



Note: 10 respondents

Energy Efficiency

Figure 81: Considering energy efficiency in expansion plans

64% of those who responded (35 businesses) are considering energy efficiency in their expansion plans.

Note: 55 respondents

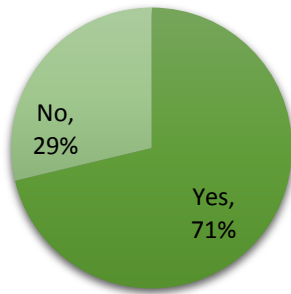
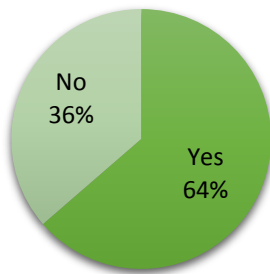


Figure 82: Awareness of BC Hydro Power Smart

71% of respondents (57 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Note: 80 respondents

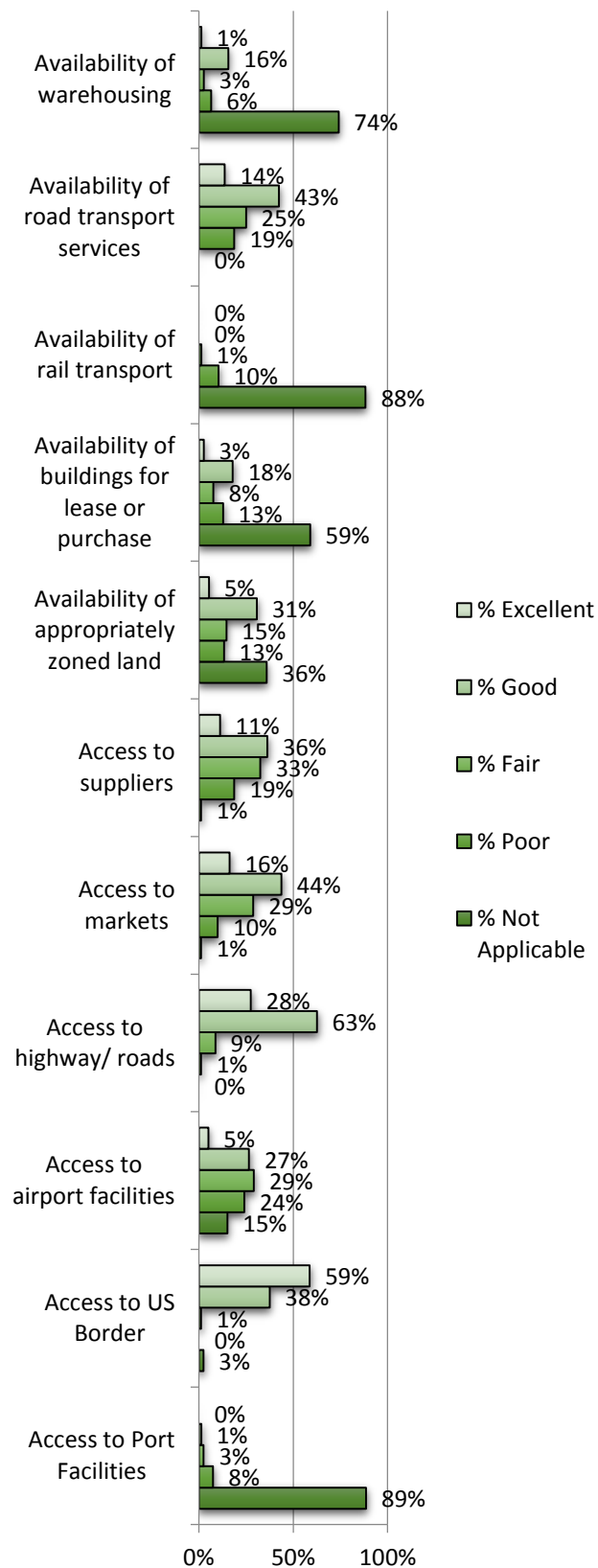


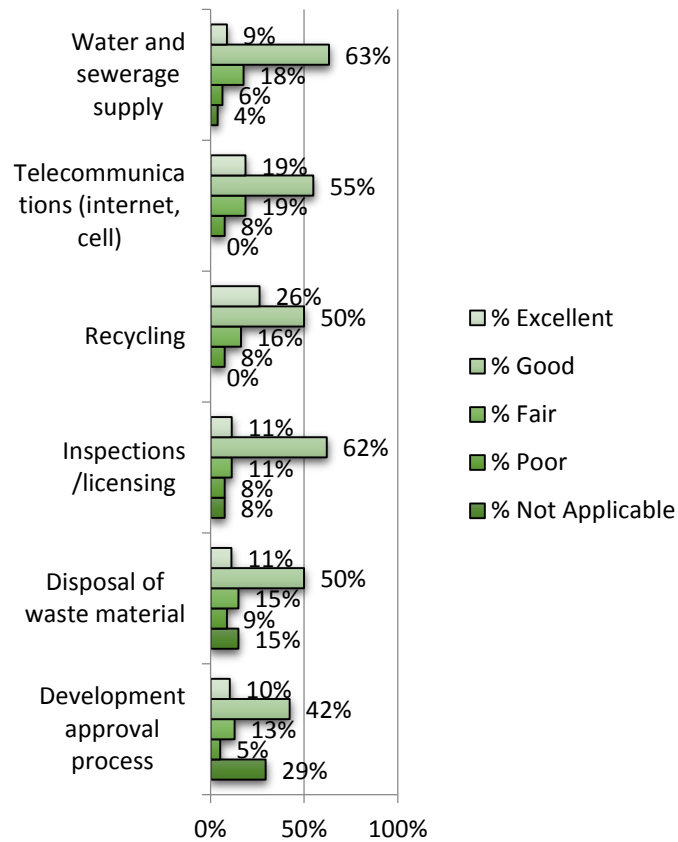
GOVERNMENT SERVICES

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 access to airport facilities (24% or 19 businesses), access to suppliers (19% or 15 businesses), and availability of road transport services (19% or 15 businesses).
- The services that received the highest number of **FAIR** ratings were access to suppliers (33% or 26 businesses), access to airport facilities (29% or 23 businesses), and access to markets (29% or 23 businesses).
- The services that received the highest number of **GOOD** ratings were access to highways/roads (63% or 50 businesses), inspections/licensing (62% or 49 businesses) and water and sewerage supply (63% or 50 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to US border (59% or 47 businesses), access to highway/roads (28% or 22 businesses), and recycling (26% or 21 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (89% or 70 businesses), availability of rail transport (88% or 68 businesses), and the availability of warehousing (74% or 57 businesses).

Figure 83: 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, 56% respondents (44 businesses) indicated they had suggestions. The highest number of responses (11% or 5 businesses) discussed improvements to the highway infrastructure, along with expansion of high speed internet services (9% or 4 businesses).

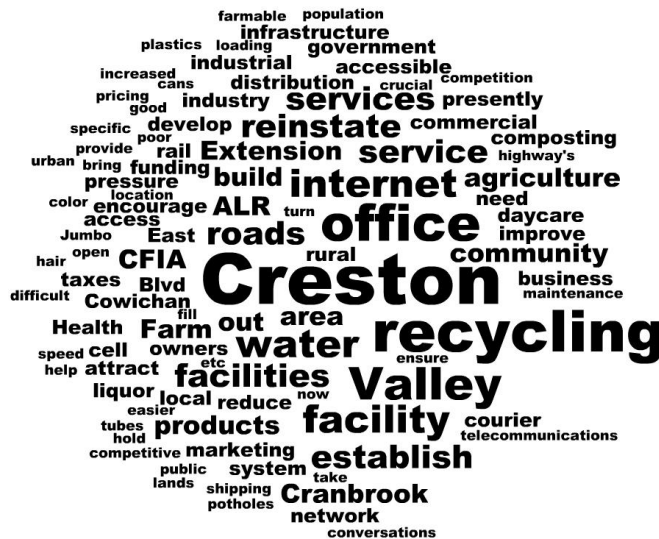


Figure 84: Key words and responses in respondents' suggestions for improvements to government services

"any increased competition with respect to telecommunications would help to reduce prices."

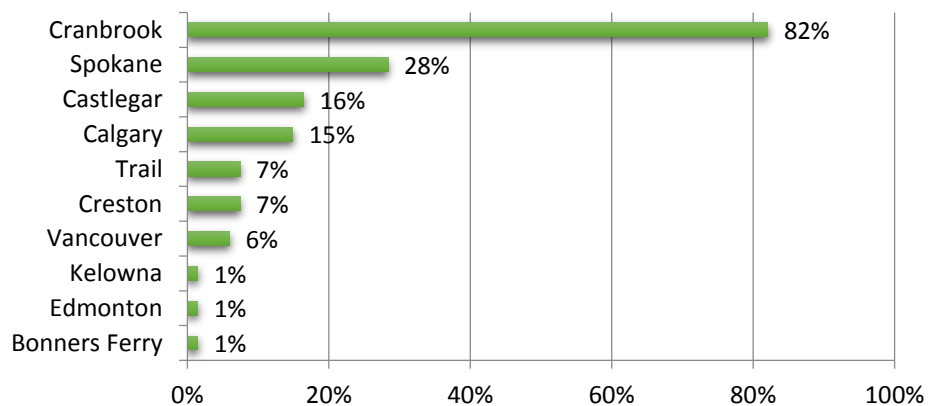
"get rid of privatization of highway's maintenance -- very bad service!"

"Stronger cell coverage and more affordable internet."

Airport Service

The Canadian Rockies International Airport (Cranbrook) is the most used airport, with 82% of respondents (55 businesses) indicating they use that airport. The Spokane International Airport was the second most used with 28% (19 businesses), and the Castlegar Airport being used by 16% of respondents (11 businesses).

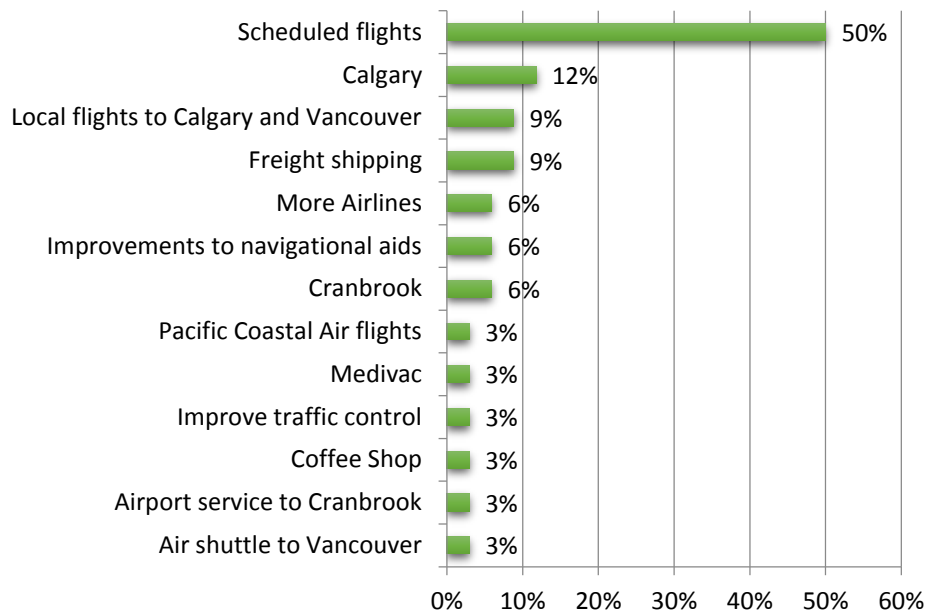
Figure 85: Airport service used



Note: 67 respondents

Respondents indicated that they would most like improvements to scheduled flights (50% or 17 businesses) and flights to Calgary (12% or 4 businesses).

Figure 86: New services at local airport



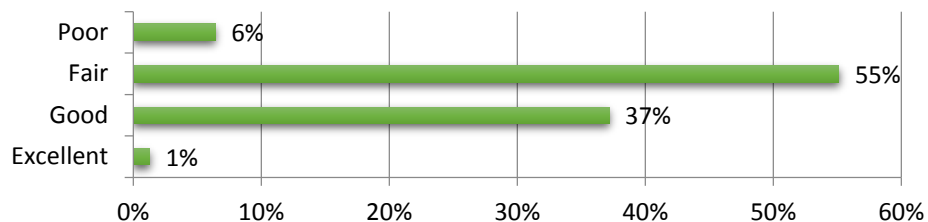
Note: 34 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as fair (55% or 43 businesses).

Figure 87: Rating of local business climate



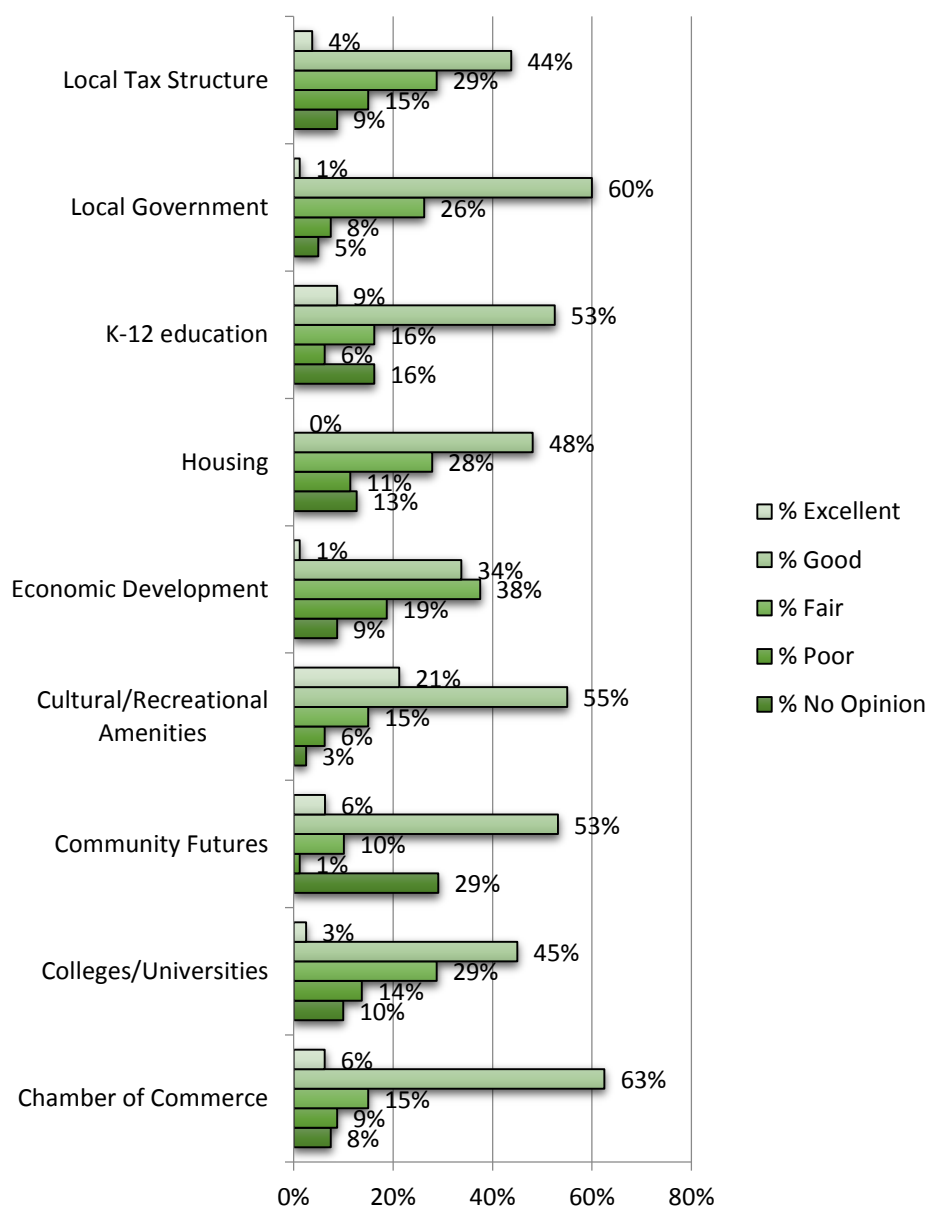
Note: 78 respondents

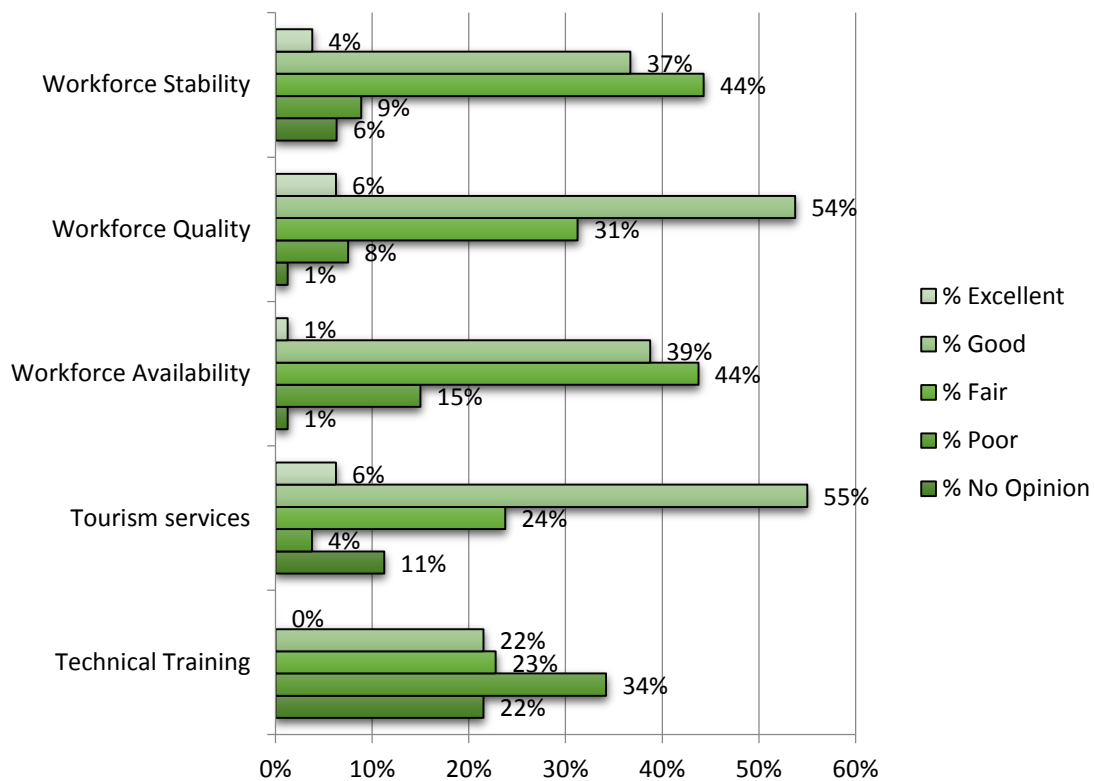
Respondents rated the quality of a list of specific business climate factors as either poor, fair, good, excellent, or not applicable to their business.

- The factors that received the highest number of **POOR** ratings included technical training (34% or 27 businesses), economic development (19% or 15 businesses), local tax structure (15% or 12 businesses), and workforce availability (15% or 12 businesses).

- The factors that received the highest number of **FAIR** ratings included economic development (38% or 30 businesses), workforce stability (44% or 35 businesses), and workforce availability (44% or 35 businesses).
- The factors that received the highest number of **GOOD** ratings included Chamber of Commerce (63% or 50 businesses) and local government (60% or 48 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included cultural/recreational amenities (21% or 17 businesses) and K-12 education (9% or 7 businesses).
- The factors that received the highest number of **NO OPINION** ratings include Community Futures (29% or 23 businesses) and Technical Training (22% or 17 businesses).

Figure 88: Rating of business climate factors

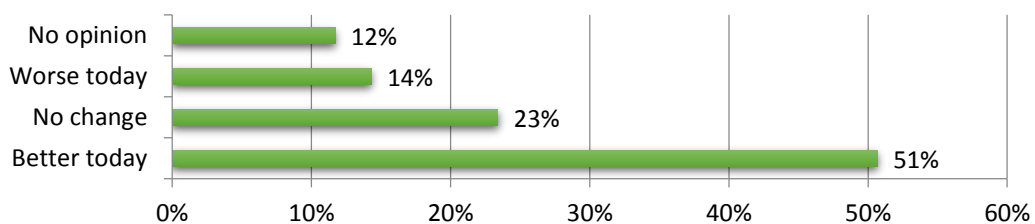




Note: # of respondents varies

51% of respondents (39 businesses) felt that the business climate is better today than it was 5 years ago. 14% (11 businesses) thought that it is worse, and 23% (18 businesses) believed there was no change in the business climate. The main reason given from those who believe the business climate is worse is the declining economy (37% or 4 respondents).

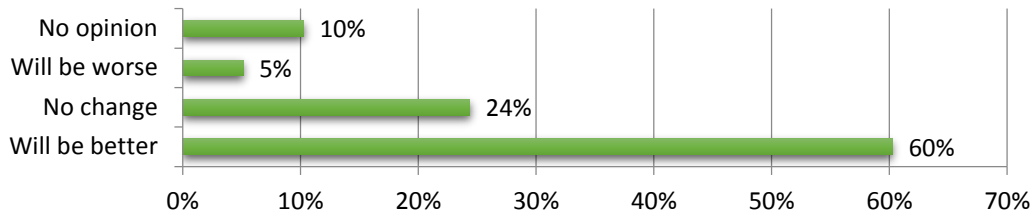
Figure 89: Business climate today vs. 5 years ago



Note: 77 respondents

60% of respondents (47 businesses) expect that the business climate will be better 5 years from today. 5% (4 businesses) expect that it will be worse.

Figure 90: Business climate 5 years from today

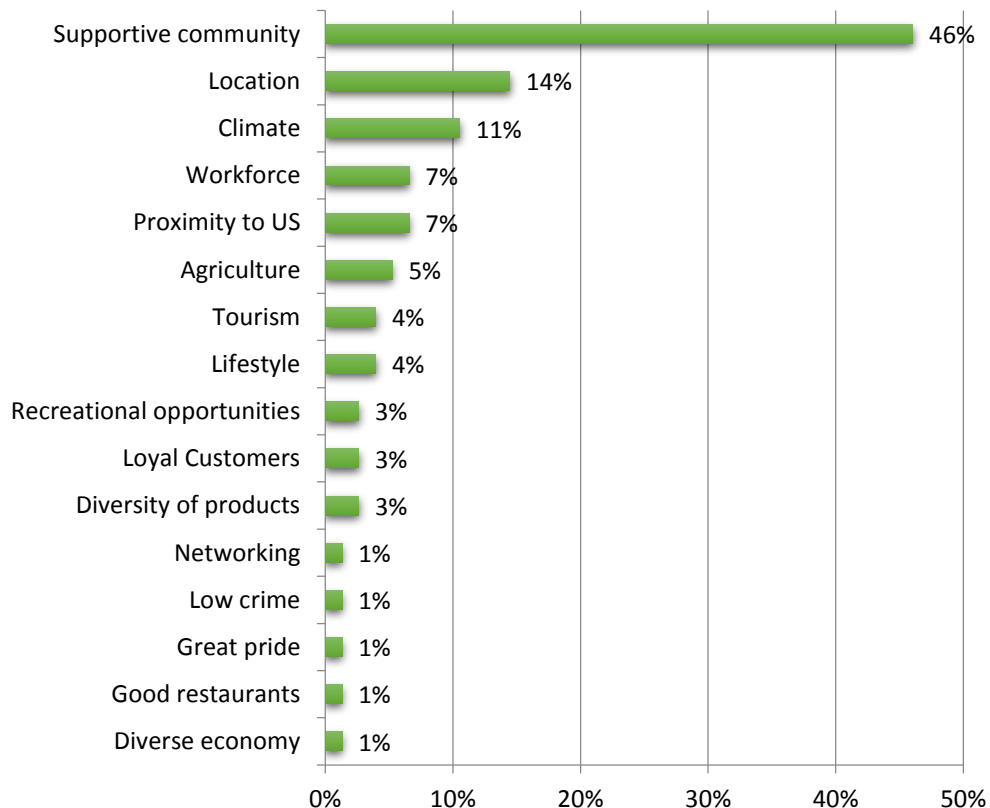


Note: 78 respondents

Strengths and Weaknesses of Business Climate

85 responses were provided when respondents were asked to list the community's strengths as a place to do business, the highest number of responses (46% or 35 responses) cited the supportive community as the community's primary strength. 14% (11 businesses) indicated the location and 11% (8 businesses) indicated the climate.

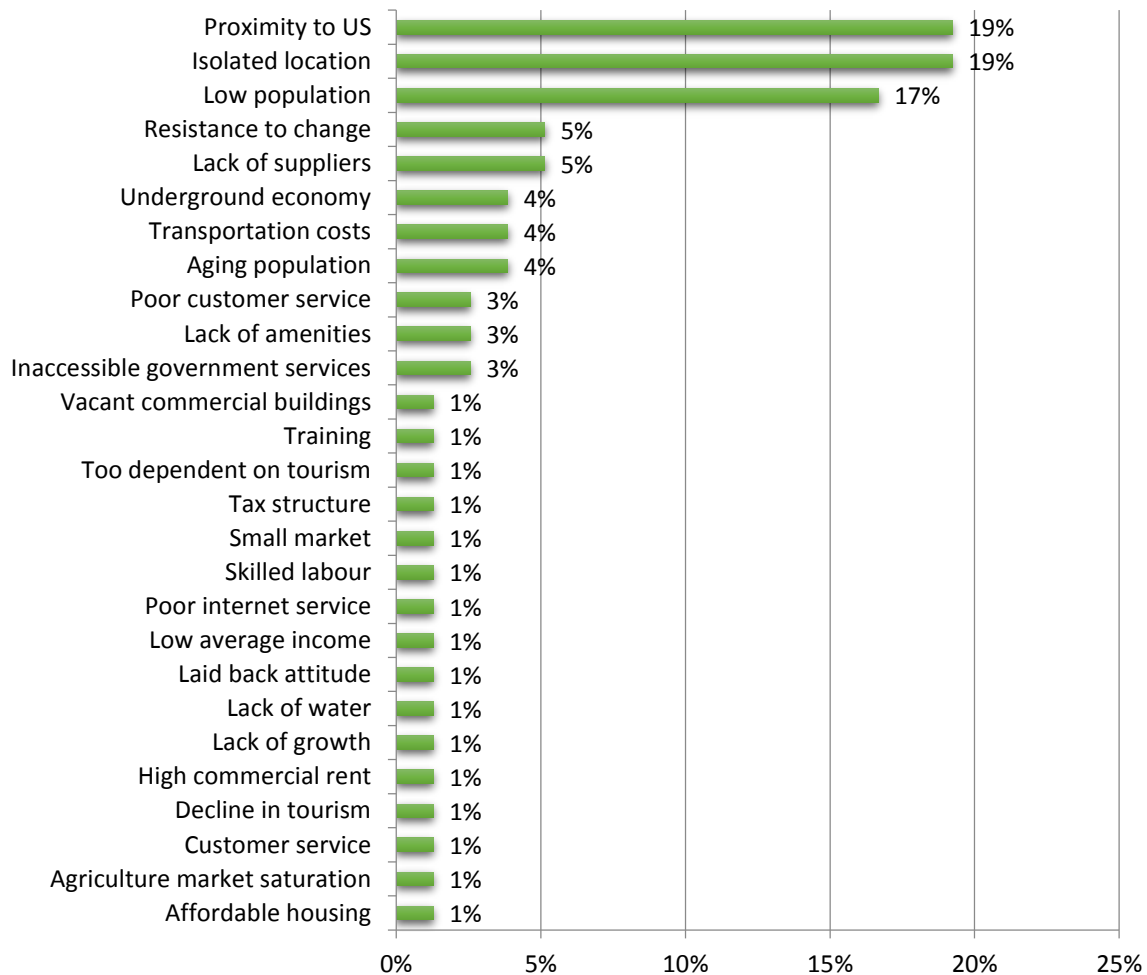
Figure 91: Community's strengths as a place to do business



Note: 76 respondents

Respondents were asked to list the community's weaknesses as a place to do business. The highest number of responses (19% or 15 respondents) was received for the proximity to the US and its' isolated location respectively. The low population were cited by 17% of respondents (13 businesses), while the resistance to change and lack of suppliers were both cited by 5% of respondents (4 businesses).

Figure 92: Community's weaknesses as a place to do business

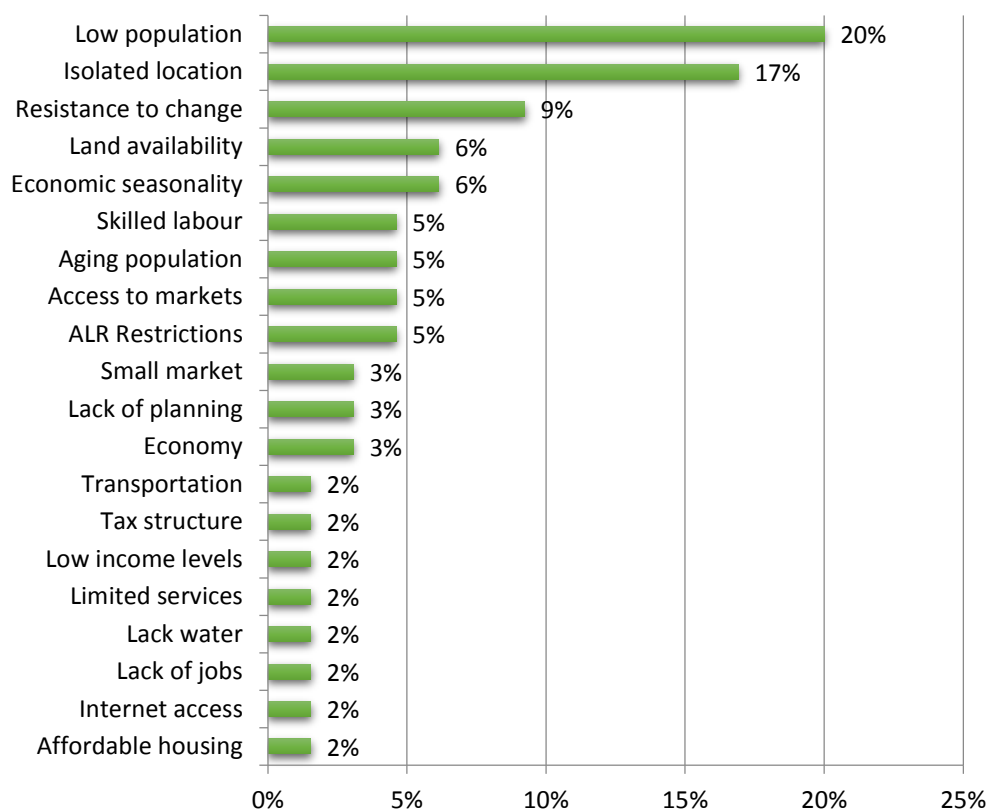


Note: 78 respondents

Business Growth

81% of respondents (65 businesses) indicated that there are barriers to growth. The highest number of respondents (20% or 13 businesses) stated that the low population is an important barrier to growing the community's economy. Other commonly cited barriers include isolated location (17% or 11 businesses) and resistance to change (9% or 6 businesses).

Figure 93: Barriers to growth in the community



Note: 65 respondents

The following excerpts illustrate the barriers cited:

"need a more "mixed age" population."

"not much to do in winter time."

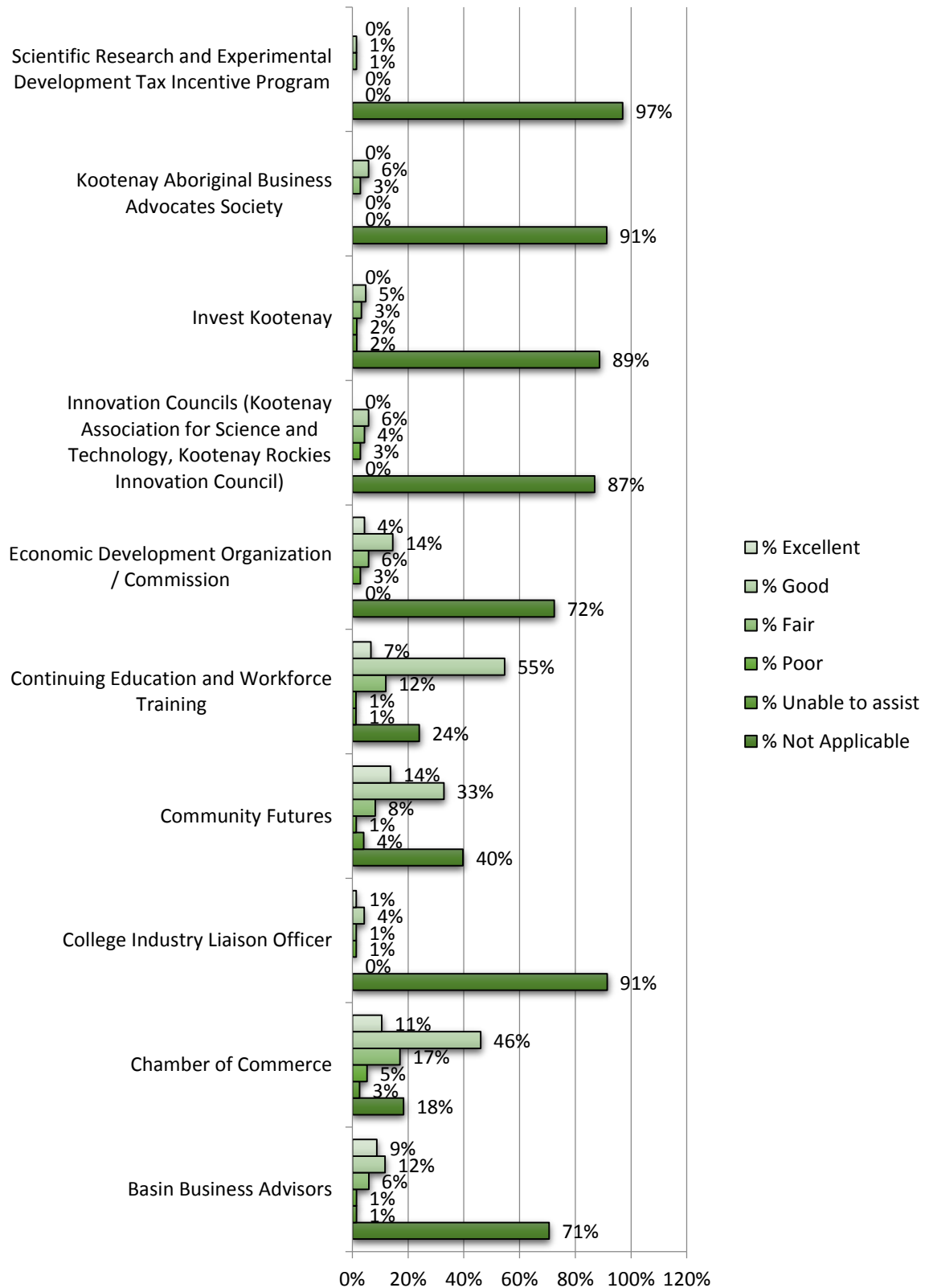
"remote/rural location far from major centres."

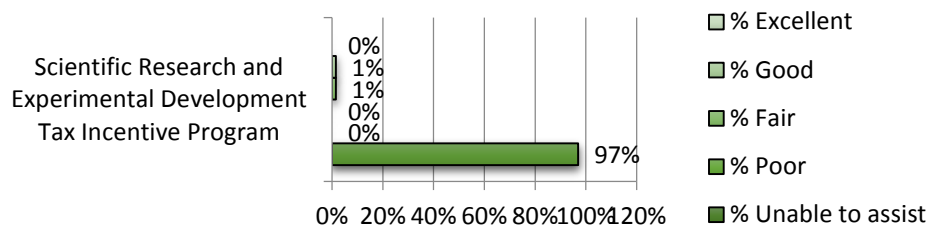
"chipping away of basic services that the community has to fight for to retain."

Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest Poor response (5% or 4 businesses) and one of the highest Excellent responses (11% or 8 businesses), as well as high responses for

Good (46% or 35 businesses) and Fair (17% or 13 businesses). Community Futures was cited as providing an excellent level of service by 14% of respondents (10 businesses). Respondents found the Community Futures (4% or 3 businesses) and Chamber of Commerce (3% or 2 businesses) most commonly unable to assist.

Figure 94: Level of service from business support providers

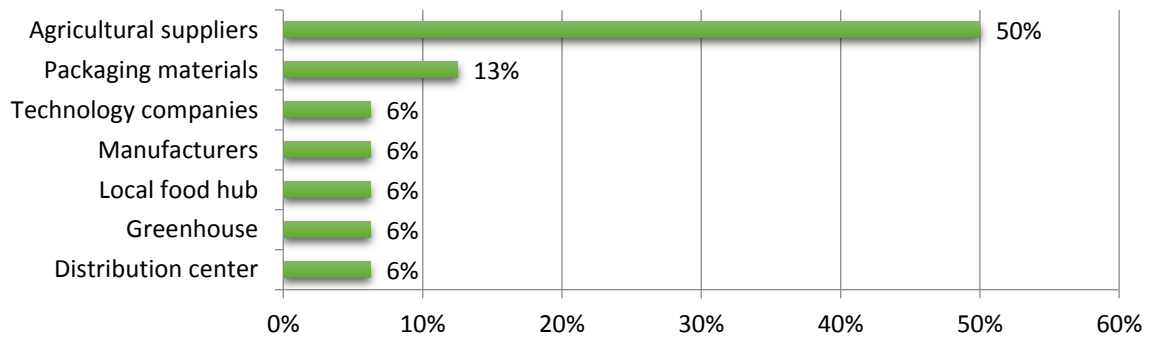




Note: # of respondents varies

29% of respondents (23 businesses) indicated that there are suppliers that could locate in the region. Agricultural suppliers was most commonly cited by 50% of respondents (8 businesses), with packaging materials being mentioned by 13% (2 businesses).

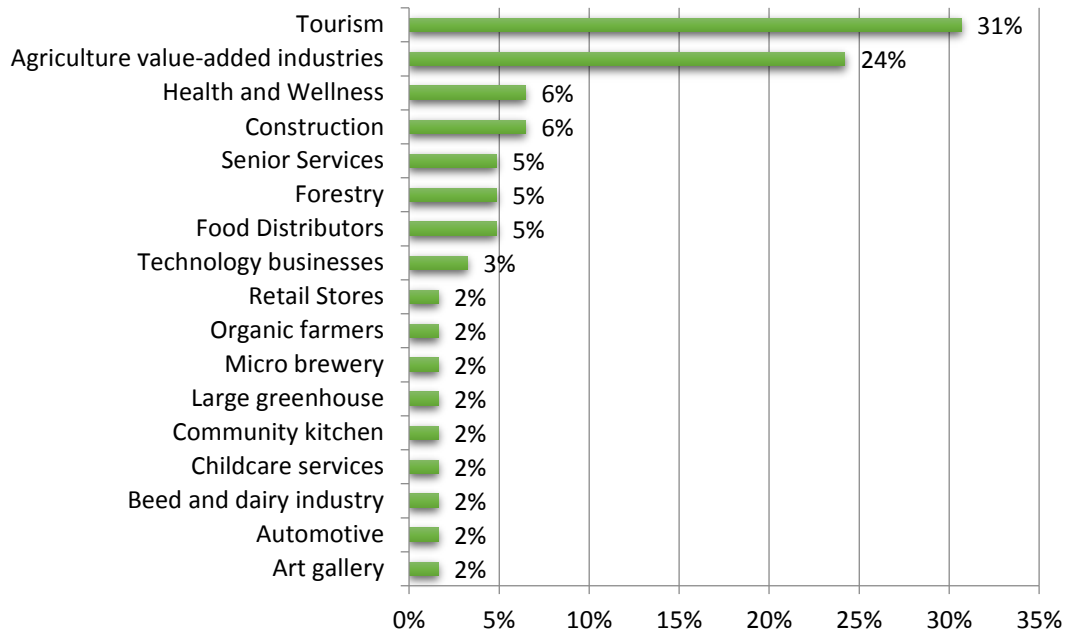
Figure 95: Potential Suppliers



Note: 16 respondents

When asked what business, sector or industry could be attracted to most strategically benefit the industry, the most common response was tourism (31% or 19 respondents) and agricultural value-added businesses (24% or 15 businesses)

Figure 96: Sectors, businesses or industries that could be attracted to region

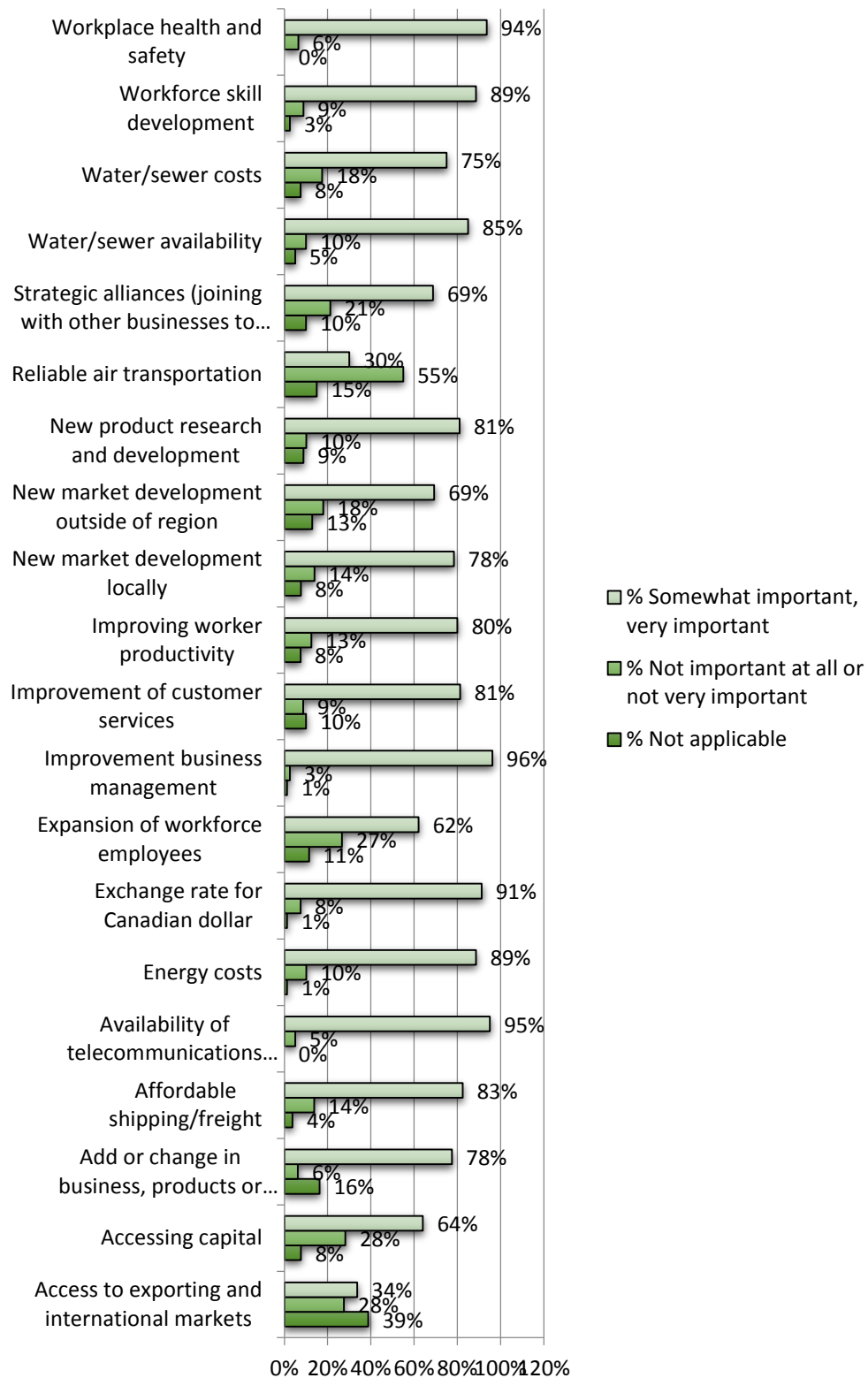


Note: 62 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include improvement of business management (96% or 76 businesses), availability of telecommunications infrastructure and services (95% or 76 businesses), and workplace health and safety (94% or 73 businesses).

Figure 97: Importance of business competitiveness factors

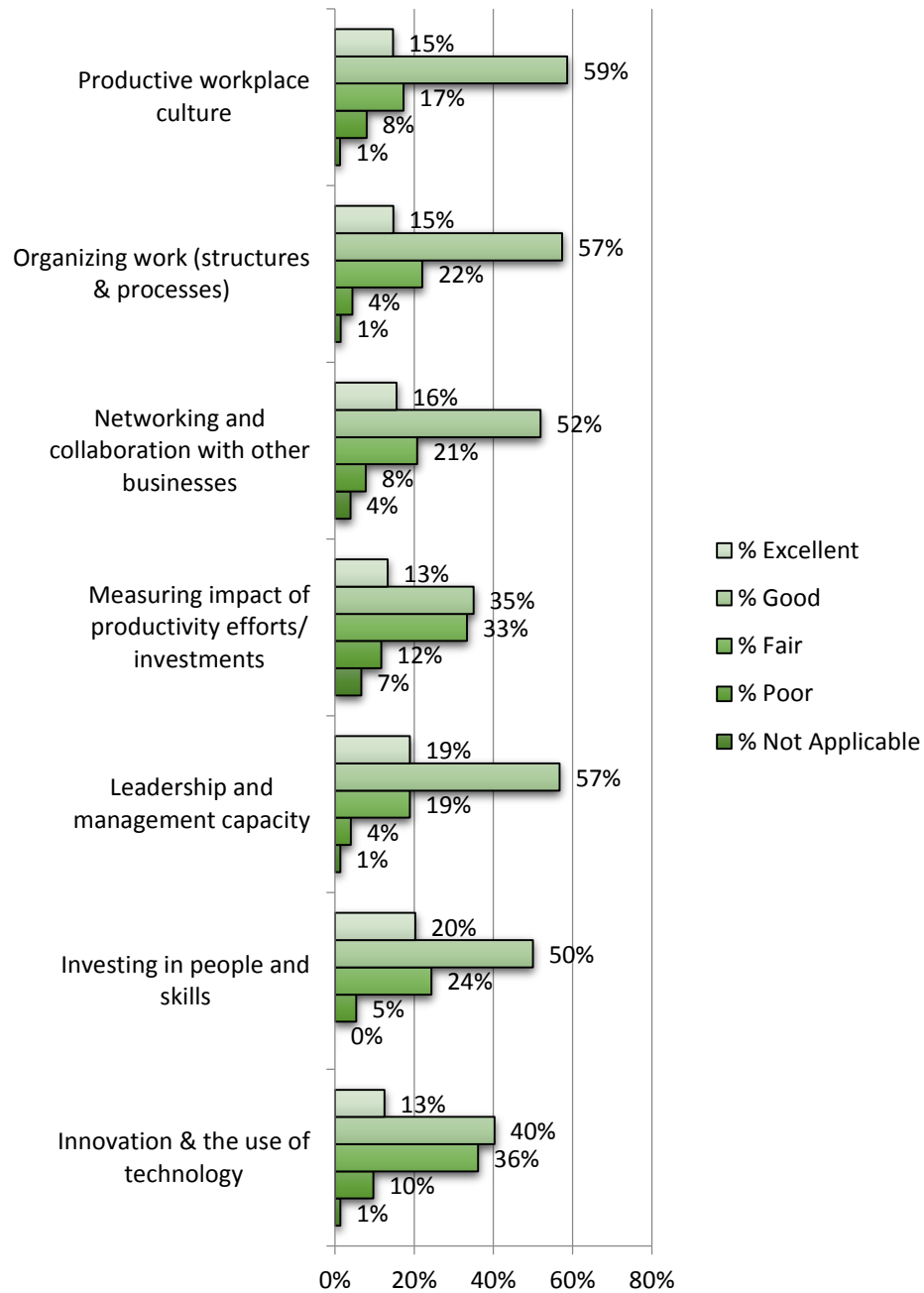


Note: # of respondents varies

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

- **EXCELLENT** ratings include investing in people and skills (20% or 15 businesses) and leadership and management capacity (19% or 14 businesses);
- **GOOD** ratings include productive workplace culture (59% or 44 businesses), organizing work (structure and process) (57% or 39 businesses), and leadership and management capacity (57% or 42 businesses);
- **FAIR** ratings include innovation and the use of technology (36% or 26 businesses);
- **POOR** ratings include measuring impact of productivity efforts/investments (12% or 7 businesses).

Figure 98: Performance on key productivity drivers

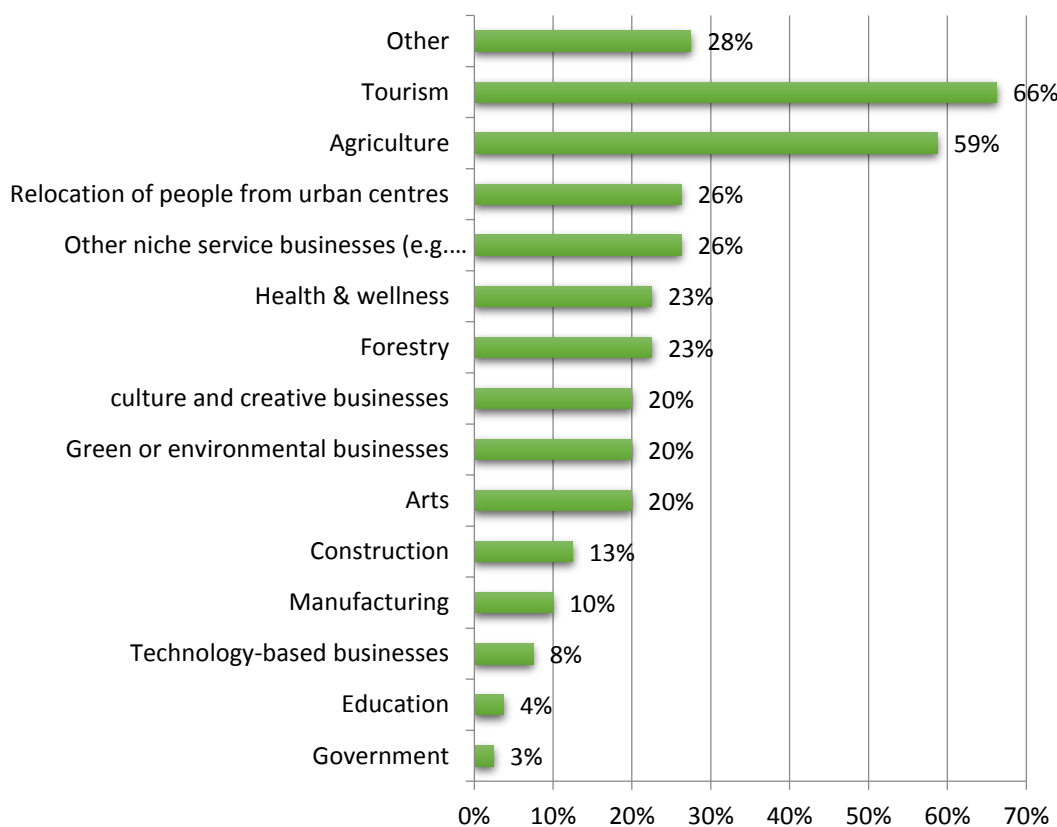


Note: # of respondents varies

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (66% or 53 businesses), agriculture (59% or 47 businesses), relocation of people from urban centres (26% or 21 businesses), and other niche service businesses (26% or 21 businesses). For a list of drivers identified as “other”, refer to Appendix A.

Figure 99: Economic drivers with greatest growth potential

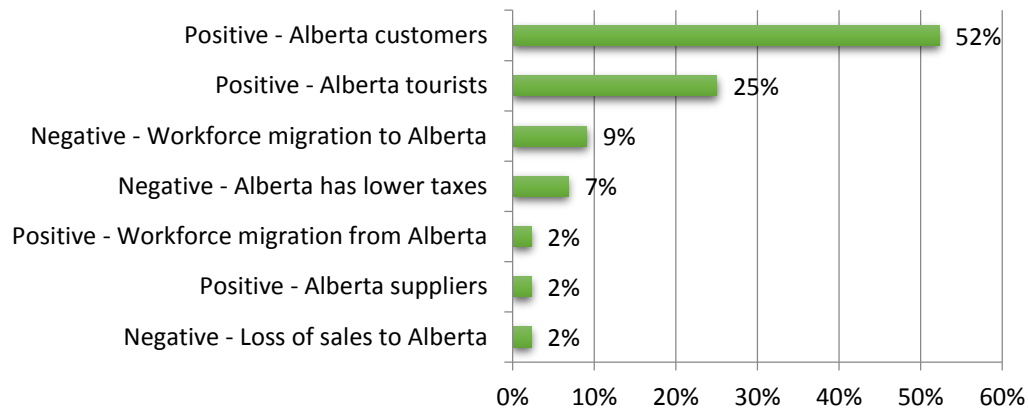


Note: 80 respondents

Proximity to Alberta

44 respondents (55%) reported that they were impacted by their proximity to Alberta. The positive impact of Alberta customers was the most significantly noted by 52% of respondents (23 businesses), while 25% (11 businesses) indicated a similar positive impact of tourism from Alberta.

Figure 100: Impact of Proximity to Alberta



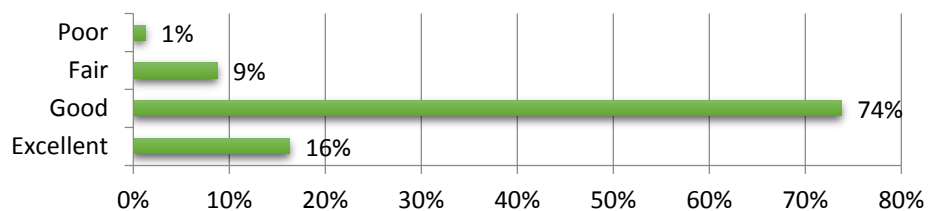
Note: 44 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (74% or 59 businesses), 16% (13 businesses) reported that their facility's health is excellent, and 9% (7 business) reported that it is fair. 1% (1 business) of respondent indicated that their company is in poor health.

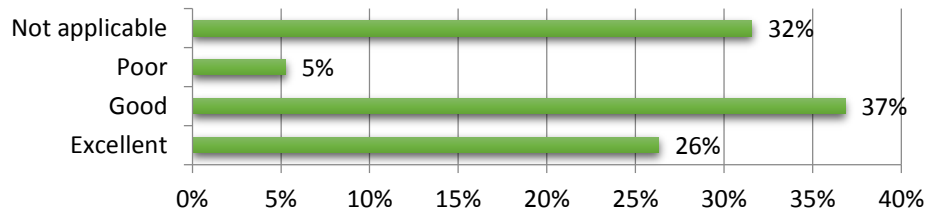
Figure 101: Facility's overall health



Note: 80 respondents

Most businesses with a parent company indicated that the health of that parent company is good (37% or 7 businesses).

Figure 102: Overall health of parent company

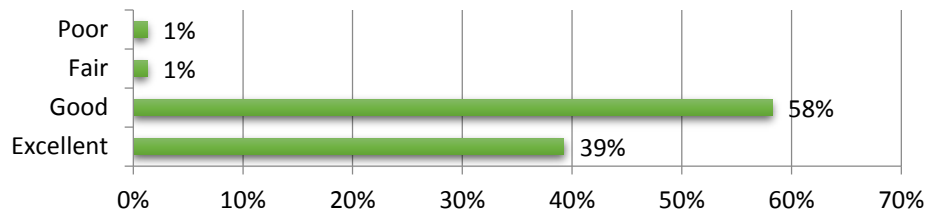


Note: 19 respondents

Attitude toward Community

58% of respondents (46 businesses) indicated that their local management's attitude toward the community is good and 39% (31 businesses) indicated that it is excellent.

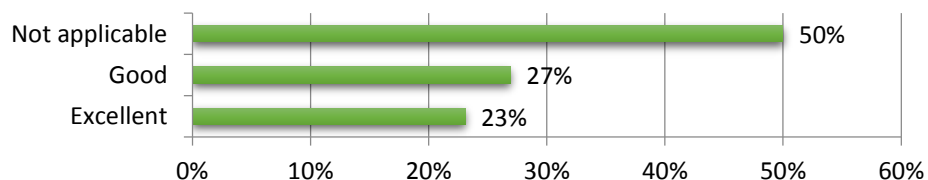
Figure 103: Local management's attitude toward community



Note: 79 respondents

Respondents indicated that their parent company's attitude toward the local community is either excellent (23% or 6 businesses) or good (27% or 7 businesses).

Figure 104: Parent company's attitude toward local community

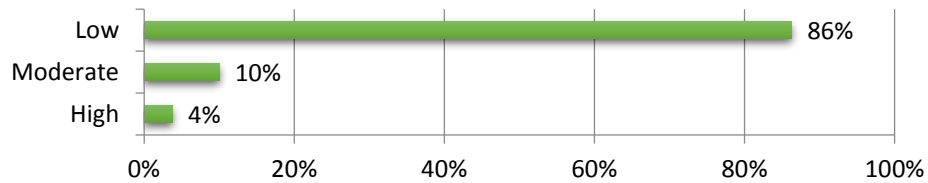


Note: 26 respondents

Risk of Closing or Downsizing

Data indicates that the risk of businesses closing or downsizing is low. 4% (3 businesses) of respondents reported that they are at a high risk of closing or downsizing in the next 1-3 years.

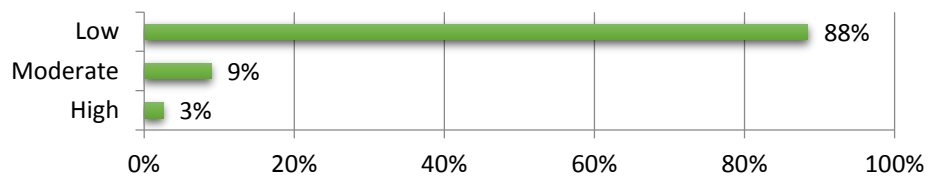
Figure 105: Risk of facility closing



Note: 80 respondents

Similarly, the data indicates that the risk of downsizing is low, with only 3% (2 businesses) indicating that risk is high.

Figure 106: Risk of facility downsizing



Note: 78 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by economic development organizations in the Town of Creston & District 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 and support links to planning and action:

1. Continually communicate (through press, presentations, electronic 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 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 1,711 employees. The majority (41%) of employees are temporary, followed closely by 38% full time employees. The size of the workforce appears stable and healthy, with 53% of businesses indicating that the number of employees at their business has stayed the same, and 27% indicating that the number has increased. Expected employment trends are also stable with the majority of businesses expecting the number of casual, part time, and full time employees to stay the same. Actions that could prove helpful include: support and expand recruitment efforts, assist with coordination of casual/temporary employee recruitment, and education/training on recruitment. Targeted actions to these areas could be considered. Related to recruitment and retention are the identified critical considerations for employees which include the cost of living, housing, childcare, and transportation. Interest was expressed in establishing a farm labour pool with an aim to better link farmers and available labour.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with just 7% of essential employees under the age of 25. The number of aging farmers is seen as indicative of the need for succession planning, but questions remain surrounding the number of youth available to take over farms. Increasing youth employment may assist in addressing the recruitment challenges that 43% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

Business Growth & Expansion

57% of businesses in the region report being in a growth cycle and 30% are maturing; however 29% are not anticipating any growth in sales over the next year, with 33% expecting moderate sales growth between 1 – 9%. The vast majority of businesses (74%) indicate that the majority of their sales are to local markets, indicating there may be an opportunity to expand into surrounding markets. 43% indicate that they are planning to expand within the next three years. 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, exploring financing options, 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, identifying and accessing new markets, and a lack of skilled staff. It is worth noting that very few (32%) 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. New opportunities exist, such as a composting or value-added facility utilizing agricultural waste (e.g., cherry culls).

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small to medium in size and independent. Tailoring supports and services to small, independent businesses, perhaps with specific actions directed at the agricultural sector will benefit businesses in Creston & District.

Natural Resources/Agriculture Focus

There are a significant number of businesses in the agricultural, forestry, fishing, and hunting sectors (29% according to the industry classification). However, it is important to note that the BRE stakeholder committee deliberately focused on the agricultural sector only for this study. The importance of the agricultural industry warrants specific and additional review to understand the specific challenges and opportunities this sector faces. An industry based stakeholder meeting could be convened to explore how this sector can specifically be supported. Interest was expressed in the reinstatement of a local agriculture extension office, together with a reinstatement of Canadian Food Inspection Agency and Interior Health's Environmental Health offices.

Supply Sourcing and Procurement

The data indicates that 48% of supplies come from within the local region. The most common response (70%) for the reason why supplies are sourced outside of the local area is that they are not available locally. Agricultural suppliers and packaging materials were the most frequently cited areas for potential suppliers to the Creston area. 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. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally.

Local businesses do not appear to engage actively with government procurement processes, with only 18% of businesses indicating that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 58% of businesses have a training budget and 73% indicated that training typically occurs locally. Areas for additional training/skill development include marketing skills, bookkeeping, and food safe. Future areas for training focused on computer and new technology training, as well as marketing, social media, and emerging technologies. 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 19% of respondents indicated that they have a formal succession plan and less than half (45%) have an up-to-date business plan. With 49% of businesses indicating that they have been in

business for more than 20 years, succession planning is timely for many. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent 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.

Financing

When financing was accessed, the most frequent type was internal (84% of businesses) in the form of personal savings or retained earnings. There is a market for businesses to access financing, with 44% of businesses indicating they will need to access financing in the next 1 – 3 years for purposes of expanding or improving equipment (78%) or making improvements to their land/building (66%). Businesses were most frequently (43%) looking for \$100,000 or more in future capital, with 32% indicating they would need \$25,000 or less. There does appear to be a market and an appetite for a community model of financing, with opportunities in small loans of \$25,000 or less and larger loans of over \$100,000. Further exploration and development of a community based financing model or microloan program appears warranted.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Agriculture, forestry, fishing and hunting	11	23	29%
Construction	23	3	4%
Manufacturing	31-33	8	10%
Retail and Wholesale Trade	41-45	14	18%
Transportation and Warehousing	48-49	1	1%
Information and Cultural Industries	51	2	3%
Finance and Insurance	52	1	1%
Real Estate and Rental and Leasing	53	3	4%
Professional, Scientific and Technical Services	54	4	5%
Educational Services	61	1	1%
Health Care and Social Assistance	62	7	9%
Arts, Entertainment and Recreation	71	5	6%
Accommodation and Food Services	72	6	8%
Other Services	81	2	3%
Total		80	100%

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Engineering/RD	11	14%
Warehousing	31	39%
Manufacturing	33	41%
Distribution	42	53%
Services	56	70%
Headquarters	65	81%
Total	238	

Survey Participants:	80	
Question Respondents:	80	
No Response Count:	0	
Response Rate:	100%	

Figure 3: Who are your competitors?: Where are your competitors located?	Count	Percent of Question Respondents
In Canada	3	4%
In Province	6	8%
Outside Canada	23	30%
In Region	64	83%
Total	96	

Survey Participants:	80
Question Respondents:	77
No Response Count:	3
Response Rate:	96%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Customer Service	1	1.25%
Demand for product	1	1.25%
Food safety programs	1	1.25%
Good customer base	1	1.25%
Good marketing agent	1	1.25%
Low cost of overhead	1	1.25%
Niche market	1	1.25%
Proximity to US border	1	1.25%
Strong volunteer base	1	1.25%
Workforce	1	1.25%
Pricing	2	2.50%
Demographics	3	3.75%
Excellent market	3	3.75%
Tourism	4	5.00%
Customer loyalty	5	6.25%
Diversity of products	6	7.50%
Quality product	6	7.50%
Good farm land	8	10.00%
Hard work	9	11.25%

Reputation	10	12.50%
Excellent staff	12	15.00%
Location	17	21.25%
Supportive community	22	27.50%
Total	117	

Survey Participants: 80
Question Respondents: 80
No Response Count: 0
Response Rate: 100%

Figure 5: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	11	14%
No	69	86%
Total	80	

Survey Participants: 80
Question Respondents: 80
No Response Count: 0
Response Rate: 100%

Figure 6: Does this company have another location elsewhere?: If Yes, where?	Count	Percent of Question Respondents
Outside Canada	3	27%
Elsewhere in nation	5	45%
In Province	9	82%

Total 17

Survey Participants: 80
Question Respondents: 11
No Response Count: 0
Parent Question 'Yes' Respondents: 11

Figure 7: Location of company's headquarters	Count	Percent of Question Respondents
Elsewhere in nation	5	6%
In Province	74	94%

Total	79	

Survey Participants: 80
Question Respondents: 79
No Response Count: 1
Response Rate: 99%

Figure 7b: Location of company's headquarters: Province	Count	Percent of Question Respondents
AB	1	1.27%
QC	1	1.27%
ON	3	3.80%
BC	74	93.67%
Total	79	

Survey Participants: 80
Question Respondents: 79
No Response Count: 1
Response Rate: 99%

Figure 7c: Location of company's headquarters: Nation	Count	Percent of Question Respondents
Canada	7	100.00%
Total	7	

Survey Participants: 80
Question Respondents: 7
No Response Count: 73
Response Rate: 9%

Figure 7d: Corporate headquarters location, if different than local location	Count	Percent of Question Respondents
Fort McLeod Alberta, Edmonton Alberta, Lethbridge Alberta , Calgary Alberta, Okotoks Alberta	1	25.00%
Nelson BC , Castlegar BC , Salmo BC , Slocan Valley BC,	1	25.00%

Vancouver BC, Edmonton AB, London ON, Toronto ON, Montreal PQ, Halifax NS, St. John's NL	1	25.00%
Wynndel BC	1	25.00%
Total	4	

Survey Participants: 80
 Question Respondents: 4
 No Response Count: 76
 Response Rate: 5%

Figure 8: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	5	6%
Emerging	5	6%
Growing	45	57%
Maturing	24	30%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 9: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	1	1%
1-4 Years	14	18%
5-9 Years	15	19%
10-19 Years	11	14%
>20 Years	39	49%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 10: What is this company's ownership status?	Count	Percent of Question Respondents
--	--------------	--

Publicly owned	5	7%
Privately owned	69	93%
Total	74	

Survey Participants: 80
 Question Respondents: 74
 No Response Count: 6
 Response Rate: 92%

Figure 10b: What is this company's legal status?	Count	Percent of Question Respondents
Non-profit	5	7%
Partnership	8	11%
Sole proprietorship	20	26%
Corporation	41	54%
Other	2	3%
Total	76	

Survey Participants: 80
 Question Respondents: 76
 No Response Count: 4
 Response Rate: 95%

Figure 10c: What is this company's legal status?: If <i>Other</i>, please specify	Count	Percent of Question Respondents
Co-operative	1	1%
Franchise	1	1%
Total	2	
Survey Participants:	80	

Question Respondents: 2
 No Response Count: 0
 Parent Question 'Other' Respondents: 2
 Parent Question Respondents: 76
 Response Rate: 100%

Figure 11: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	17	22%
No	61	78%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 11b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Neutral	5	29%
Positive	12	71%
Total	17	

Survey Participants: 80
 Question Respondents: 17
 No Response Count: 0
 Parent Question 'Yes' Respondents: 17
 Parent Question Respondents: 78
 Response Rate: 100%

Figure 11c: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	3	4%
No	75	96%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 12: If Yes what is the anticipated time frame	Count	Percent of Question Respondents
---	--------------	--

1 year or less	1	33%
2 years	1	33%
3 years or more	1	33%
Total	3	

Survey Participants: 80
 Question Respondents: 3
 No Response Count: 0
 Parent Question 'Yes' Respondents: 3
 Parent Question Respondents: 78
 Response Rate: 100%

Figure 13: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Sell to another company	1	33%
Sell/transfer to a non-family member	1	33%
Other	1	33%
Total	3	
Survey Participants:	80	

Question Respondents: 3
 No Response Count: 0
 Parent Question 'Yes' Respondents: 3
 Parent Question Respondents: 78
 Response Rate: 100%

Figure 13b: If Yes, how do you intend to exit the business?: If <i>other</i>, please explain	Count	Percent of Question Respondents
Members can transfer their shares back into the co-op for resale to existing members.	1	33.33%
Total	1	

Survey Participants: 80
 Question Respondents: 1
 No Response Count: 0
 Parent Question 'Other' Respondents: 1

Parent Question Respondents: 3
 Response Rate: 100%

Figure 14: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	15	19%
No	60	78%
Not applicable	2	3%
Total	77	

Survey Participants: 80
 Question Respondents: 77
 No Response Count: 3
 Response Rate: 96%

Figure 14b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	20	26%
No	58	74%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 14c: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	9	75%
No	3	25%
Total	12	

Survey Participants: 80
 Question Respondents: 12
 No Response Count: 3
 Parent Question 'Yes' Respondents: 15
 Parent Question Respondents: 77
 Response Rate: 80%

Figure 14d: If Yes, by whom	Count	Percent of Question Respondents
Other	4	100.00%
Total	4	
Survey Participants:	80	
Question Respondents:	4	

No Response Count: 5

Parent Question 'Yes' Respondents: 9

Parent Question Respondents: 12

Response Rate: 44%

Figure 14e: If Yes, by whom: If other, please explain	Count	Percent of Question Respondents
Accountant, Banker, Business Partner	1	25.00%
Accountant, Personal Financial Planner, and Spouse	1	25.00%
BBA program	1	25.00%
Notary	1	25.00%
Total	4	
Survey Participants:	80	

Question Respondents: 7

No Response Count: 0

Parent Question 'Other' Respondents: 4

Parent Question Respondents: 4

Response Rate: 44%

Figure 15: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	35	45%
No	43	55%
Total	78	

Survey Participants: 80

Question Respondents: 78

No Response Count: 2

Response Rate: 98%

LOCAL WORKFORCE

Figure 16: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	29	36%
5-9	23	29%
10-19	7	9%
20-49	11	14%
50-99	5	6%
Over 100	5	6%
Total	80	

Total employees: 1711

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 17: Nature of Employment	Count	Percent of Question Respondents
Full Time	656	38%
Part Time	360	21%
Temporary	695	41%
Total	1711	

Survey Participants: 80
 Question Respondents: 80

Figure 17b: Total number of employees at this facility*: Full-time employees	Count	Percent of Question Respondents
Less than 5	57	71.25%
5-9	10	12.50%
10-19	5	6.25%
20-49	4	5.00%
50-99	3	3.75%
Over 100	1	1.25%
Total	80	

Total full-time employees: 656
 Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0

Response Rate: 100%

Figure 17c: Total number of employees at this facility*: Part-time employees	Count	Percent of Question Respondents
Less than 5	65	81.25%
5-9	6	7.50%
10-19	3	3.75%
20-49	4	5.00%
50-99	2	2.50%
Total	80	

Total part-time employees: 360

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 17d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	59	73.75%
5-9	9	11.25%
10-19	2	2.50%
20-49	5	6.25%
50-99	3	3.75%

Over 100 2 2.50%

Total 80

Figure 18: Historical employment trend	Count	Percent of Question Respondents
Declining	16	20%
Staying the same	42	53%
Increasing	21	27%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 19: How did the number of staff change, if at all, in the last 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	17	23%
Stayed the same	52	69%
Decreased	6	8%
Total	75	

Survey Participants: 80
 Question Respondents: 75
 No Response Count: 5
 Response Rate: 94%

Figure 19b: How did the number of staff change, if at all, in the last 3 years?: Part-time	Count	Percent of Question Respondents
Increased	16	23%
Stayed the same	44	64%
Decreased	9	13%
Total	69	

Survey Participants: 80
 Question Respondents: 69
 No Response Count: 11
 Response Rate: 86%

Figure 19c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	15	23%
Stayed the same	44	69%
Decreased	5	8%
Total	64	

Survey Participants: 80
 Question Respondents: 64
 No Response Count: 16
 Response Rate: 80%

Figure 20: 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	21	27%

Stayed the same	53	69%
Decreased	3	4%
Total	77	

Survey Participants: 80
 Question Respondents: 77
 No Response Count: 3
 Response Rate: 96%

Figure 20b: 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	14	19.44%
Stayed the same	52	72.22%
Decreased	6	8.33%
Total	72	

Survey Participants: 80
 Question Respondents: 72
 No Response Count: 8
 Response Rate: 90%

Figure 20c: 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	15	23.08%
Stayed the same	42	64.62%
Decreased	8	12.31%

Total 65
 Survey Participants: 80
 Question Respondents: 65
 No Response Count: 15
 Response Rate: 81%

Figure 21: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	5	7%
26 - 34	17	24%
35 - 49	22	31%
50 or older	28	39%
Total	72	

Survey Participants: 80

Question Respondents: 72
 No Response Count: 8
 Response Rate: 90%

Figure 22: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
Lower than	9	15%
Same as	28	46%
Greater than	24	39%
Total	61	

Survey Participants: 80
 Question Respondents: 61
 No Response Count: 19
 Response Rate: 76%

Figure 22b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
Under \$10	1	2.00%
\$10-\$12.99	3	6.00%
\$13-\$14.99	5	10.00%
\$15-\$19.99	16	32.00%
\$20-\$29.99	16	32.00%
\$30-49.99	8	16.00%
\$100 or more	1	2.00%
Total	50	

Survey Participants: 80
 Question Respondents: 50
 No Response Count: 30
 Response Rate: 62%

Figure 22c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
Under \$10	1	2.56%
\$10-\$12.99	9	23.08%
\$13-\$14.99	6	15.38%
\$15-\$19.99	12	30.77%
\$20-\$29.99	11	28.21%
Total	39	

Survey Participants: 80

Question Respondents: 39
 No Response Count: 41
 Response Rate: 49%

Figure 22d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
Under \$10	1	2.63%
\$10-\$12.99	25	65.79%
\$13-\$14.99	2	5.26%
\$15-\$19.99	9	23.68%
\$20-\$29.99	1	2.63%
Total	38	

Survey Participants: 80
 Question Respondents: 38
 No Response Count: 42
 Response Rate: 48%

Figure 23: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	61	82%
Decreasing	5	7%
Increasing	8	11%
Total	74	

Survey Participants: 80
 Question Respondents: 74
 No Response Count: 6
 Response Rate: 92%

Figure 24: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Nationally	4	5%
Provincially	7	9%
Locally	63	85%
Total	74	

Survey Participants: 80
 Question Respondents: 74
 No Response Count: 6
 Response Rate: 92%

Figure 25: Recruitment and retention challenges	Count	Percent
Retention challenges	16	21%
Recruitment challenges	34	43%

Figure 25b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	16	21%
No	60	79%
Total	76	

Survey Participants: 80
 Question Respondents: 76
 No Response Count: 4
 Response Rate: 95%

Figure 25c: Is the company experiencing recruitment problems with any employee positions or skills?	Count	Percent of Question Respondents
Yes	34	43.04%
No	45	56.96%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 26: If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.	Count	Percent of Question Respondents
Child Care	1	2.04%
Do exit interviews	1	2.04%
Assist with employee needs	2	4.08%
Flex Time	2	4.08%
Bonuses	3	6.12%
Housing	4	8.16%
Benefits	5	10.20%
Find additional work for slow times	6	12.24%
Training	6	12.24%

Competitive wages	12	24.49%
Treating employees well	12	24.49%
Total	54	

Survey Participants: 80
 Question Respondents: 49
 No Response Count: 31
 Response Rate: 61%

Figure 27: If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
Benefits	1	2%
Flex time	1	2%
Job Fairs	1	2%
Raised Wages	1	2%
Recruiting Firms	1	2%
Summer Works Program	1	2%
Training	1	2%
Building positive relationships	2	3%
Networking	2	3%
Reached out to Colleges	2	3%
Contact with KES	6	9%
Advertising	10	16%
Internet	10	16%
Social Media	12	19%
Word of mouth	13	20%
Total	64	

Survey Participants: 80
 Question Respondents: 64
 No Response Count: 16
 Response Rate: 80%

Figure 28: Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?	Count	Percent of Question Respondents

Manufacturing/Other	1	3%
Marketing	1	3%
Plant Managers / Operators	1	3%
Healthcare Professionals	2	6%
Food/Beverage Service	3	9%
Machine Operators	3	9%
Professional/Other	3	9%
Professional/Technical	3	9%
Sales/Retail	3	9%
Agriculture/Farming	8	24%
Other	32	94%
Total	60	

Survey Participants:	80
Question Respondents:	34
No Response Count:	0
Parent Question 'Yes' Respondents:	34
Parent Question Respondents:	79
Response Rate:	100%

Figure 28b: Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)	Count	Percent of Question Respondents
Auto parts sales persons	1	2.94%
Building materials salesperson	1	2.94%
Employment counsellor	1	2.94%
Equipment operators	1	2.94%
Experienced lab technician	1	2.94%
Field Survey Technicians	1	2.94%
Field hand	1	2.94%
Financial	1	2.94%
Kitchen staff	1	2.94%
Livestock farmhand	1	2.94%
Lumber grading	1	2.94%
Marketing	1	2.94%

Nursing	1	2.94%
Office Manager	1	2.94%
Recreation	1	2.94%
Semi-Skilled/Entry Level	1	2.94%
Skilled Stylists	1	2.94%
Sorters for packing house	1	2.94%
Yarder	1	2.94%
Agriculture workers	2	5.88%
Chefs	2	5.88%
Semi-Skilled	2	5.88%
Skilled/Professional	3	8.82%
Entry Level	4	11.76%
Total	32	
Survey Participants:	80	
Question Respondents:	31	
No Response Count:	1	

Parent Question 'Other'
Respondents: 32
Parent Question
Respondents: 34
Response Rate: 97%

Figure 29: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	35	46.05%
No	41	53.95%
Total	76	

Survey Participants: 80
Question Respondents: 76
No Response Count: 4
Response Rate: 95%

Figure 29b: Do you anticipate future recruiting difficulties i.e. 3-5 year?: If Yes, in what area(s)?	Count	Percent of Question Respondents
Advanced Manufacturing Workers	1	3%

Electrical/Electronics	1	3%
Machine Operators	1	3%
Marketing	1	3%
Professional/Technical	1	3%
Construction/Contractors	2	6%
Food/Beverage Service	3	9%
Sales/Retail	3	9%
Professional/Other	4	11%
Agriculture/Farming	5	14%
Other	33	94%
Total	55	

Survey Participants:	80
Question Respondents:	35
No Response Count:	0
Parent Question 'Yes'	
Respondents:	35
Parent Question	
Respondents:	76
Response Rate:	100%

Figure 29c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)	Count	Percent of Question Respondents
Agriculture workers	1	2.86%
Asparagus pickers	1	2.86%
Auto glass technician	1	2.86%
Chokerman	1	2.86%
Cider maker	1	2.86%
Customer service	1	2.86%
Entry-level farm	1	2.86%
Equipment operator	1	2.86%
Ground crop (vegetables) work	1	2.86%
Installers	1	2.86%
Lumber graders	1	2.86%
Marketing	1	2.86%
Real Estate Salespersons	1	2.86%
Repair & Maintenance	1	2.86%
Skilled construction workers	1	2.86%

Skilled partsmen	1	2.86%
Sorters	1	2.86%
Travel Consultant	1	2.86%
Yarder	1	2.86%
Entry Level	2	5.71%
Unskilled	2	5.71%
Semi-Skilled	3	8.57%
Skilled/Professional	3	8.57%
Skilled	9	25.71%
Total	38	

Survey Participants: 80
 Question Respondents: 31
 No Response Count: 2
 Parent Question 'Other' Respondents: 33
 Parent Question Respondents: 35
 Response Rate: 94%

Figure 30: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	25	37%
No	42	63%
Total	67	

Survey Participants: 80
 Question Respondents: 67
 No Response Count: 13
 Response Rate: 84%

Figure 30b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent of Question Respondents
Open more nursing care aid programs	1	4.00%
Recognize flooring installers as a trade	1	4.00%
Summer Works Program	1	4.00%

Teach vegetarian cooking	1	4.00%
Temporary Foreign Worker	1	4.00%
Work with local college	1	4.00%
Develop a farm labour pool	3	12.00%
Subsidize wages	4	16.00%
Training	4	16.00%
Effective Advertising	6	24.00%
Total	23	

Survey Participants: 80

Question Respondents: 25

No Response Count: 0

Parent Question 'Yes' Respondents: 25

Parent Question Respondents: 67

Response Rate: 100%

Figure 31: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	36	47%
Semi-skilled	11	14%
Entry-level	12	16%
Total	59	

Figure 31b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	13	16.88%
25 to 49%	15	19.48%
50 to 74%	22	28.57%
75 to 100%	27	35.06%
Total	77	

Survey Participants: 80

Question Respondents: 77

No Response Count: 3

Response Rate: 96%

Figure 31c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	18	33.96%
25 to 49%	14	26.42%
50 to 74%	19	35.85%
75 to 100%	2	3.77%
Total	53	

Survey Participants: 80
 Question Respondents: 53
 No Response Count: 27
 Response Rate: 66%

Figure 31d: Percent of workforce: Entry-level	Count	Percent of Question Respondents
less than 25%	22	50.00%
25 to 49%	9	20.45%
50 to 74%	6	13.64%
75 to 100%	7	15.91%
Total	44	

Survey Participants: 80
 Question Respondents: 44
 No Response Count: 36
 Response Rate: 55%

Figure 32: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	46	58%
No	33	42%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 32b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	68	86.08%
No	11	13.92%

Total	79	
--------------	----	--

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 32c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	35	44.87%
No	43	55.13%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 33: 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	45	57%
No	34	43%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 34: 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	65.00%
No	28	35.00%
Total	80	

Survey Participants: 80

Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 35: 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
Advertising	1	2%
Auto glass training	1	2%
Bartending	1	2%
Child care	1	2%
Conflict Resolution	1	2%
FARSHA (Farm & Ranch Safety & Health Association)	1	2%
First Aid	1	2%
Forklift Training	1	2%
Franchise Training	1	2%
Green energy	1	2%
Hair workshops	1	2%
Home Protection Office insurance training	1	2%
Horticulture training	1	2%
Irrigation management	1	2%
Professional Driver Training	1	2%
Survey specific training	1	2%
Time management	1	2%
Tractor safety	1	2%
WHMIS	1	2%
Word Press	1	2%
Workforce Safety	1	2%
Workshops relating to the dairy industry	1	2%
Customer service	2	4%
Local Workshops	2	4%

Worksafe Courses	3	6%
Business Management	5	10%
Social media	5	10%
Food Safe	6	12%
Bookkeeping	7	14%
Marketing	7	14%
Total	59	

Survey Participants: 80
 Question Respondents: 51
 No Response Count: 1
 Parent Question 'Yes' Respondents: 52
 Parent Question Respondents: 80
 Response Rate: 98%

Figure 36: What modes of education/training work best for you?	Count	Percent of Question Respondents
Online/ Webinar training	31	40%
Classroom	42	54%
Individual coaching	42	54%
Other	6	8%
Total	121	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 36: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Group training	1	1.28%
Specialty training for nurses	1	1.28%
In-house / Hands on / Workshop	3	3.85%
Total	5	

Survey Participants:	80	
Question Respondents:	5	
No Response Count:	1	

Parent Question 'Other' Respondents: 6
 Parent Question Respondents: 78
 Response Rate: 83%

Figure 37: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	2	3%
Rest of Canada	8	11%
Regional	16	22%
British Columbia	18	25%
Local	53	73%
Total	97	

Survey Participants: 80
 Question Respondents: 73
 No Response Count: 7
 Response Rate: 91%

Union status	Count	Percent of Question Respondents
Yes	11	14.10%
No	65	83.33%
Not applicable	2	2.56%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 38: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Transportation	27	37%

Child care	29	40%
Housing	42	58%
Cost of living	61	84%
Other	15	21%
Total	174	

Survey Participants: 80
Question Respondents: 73
No Response Count: 7
Response Rate: 91%

Figure 38b: 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
Camp facility for transient workers	1	1.37%
Education	1	1.37%
Growth opportunities	1	1.37%
Housing	1	1.37%
Internet	1	1.37%
Job awareness	1	1.37%
Networking for spouses.	1	1.37%
Seasonal work.	1	1.37%
Social and recreational opportunities	1	1.37%
Spouse transfers	1	1.37%
Telecommunications	1	1.37%
Seasonal work	2	2.74%
Wages	2	2.74%
Health Care	4	5.48%
Total	19	
Survey Participants:	80	

Question Respondents: 14
No Response Count: 1
Parent Question 'Other' Respondents: 15
Parent Question Respondents: 73

Response Rate: 93%

In general terms, what percent of your workforce lives in the: Community (%)	Count	Percent of Question Respondents
0-24%	2	2.56%
25-49%	1	1.28%
50-74%	3	3.85%
75-100%	72	92.31%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

:In general terms, what percent of your workforce lives in the: Region (%) - includes entire Columbia Basin-Boundary region	Count	Percent of Question Respondents
0-24%	9	75.00%
25-49%	1	8.33%
50-74%	1	8.33%
75-100%	1	8.33%
Total	12	

Survey Participants: 80
 Question Respondents: 12
 No Response Count: 68
 Response Rate: 15%

In general terms, what percent of your workforce lives in the: Outside of region (%)	Count	Percent of Question Respondents
0-24%	5	50.00%
25-49%	2	20.00%
50-74%	1	10.00%
75-100%	2	20.00%
Total	10	

Survey Participants: 80

Question Respondents: 10
 No Response Count: 70
 Response Rate: 12%

SALES

Figure 39: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	4	7%
\$49,999 to \$25,000	6	11%
\$99,999 to \$50,000	5	9%
499,999 to \$100,000	16	29%
\$999,999 to \$500,000	4	7%
\$4.9 million to 1 million	14	25%
\$9.9 million to 5 million	1	2%
\$19.9 million to 10 million	2	4%
\$50 million to 20 million	2	4%
over \$50 million	1	2%
Total	55	

Survey Participants: 80
 Question Respondents: 55
 No Response Count: 25
 Response Rate: 69%

Figure 40: Is the market for your product	Count	Percent of Question Respondents
Stable	21	26%
Decreasing	9	11%
Increasing	50	63%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 41: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents
Stable	37	55%
Decreasing	7	10%
Increasing	23	34%
Total	67	

Survey Participants: 80
 Question Respondents: 67
 No Response Count: 13
 Response Rate: 84%

Figure 42: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	4	5%
0%	21	29%
1 - 9%	24	33%
10 - 24%	13	18%
25 - 49%	4	5%
50 - 99%	4	5%
Over 100%	3	4%
Total	73	

Survey Participants: 80
 Question Respondents: 73
 No Response Count: 7
 Response Rate: 91%

Figure 43: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	8	11%
Staying the same	18	24%
Increasing	49	64%
Not applicable	1	1%

Total	76	
--------------	----	--

Survey Participants: 80
 Question Respondents: 76
 No Response Count: 4
 Response Rate: 95%

Figure 43b: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Declining	1	6%
Staying the same	1	6%
Increasing	5	31%
Not applicable	9	56%
Total	16	

Survey Participants: 80
 Question Respondents: 16
 No Response Count: 64
 Response Rate: 20%

Figure 43c:: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	14	19%
Staying the same	14	19%
Increasing	42	58%
Not applicable	2	3%
Total	72	

Survey Participants: 80
 Question Respondents: 72
 No Response Count: 8
 Response Rate: 90%

Figure 43d: Historical export sales trend	Count	Percent of Question Respondents

Declining	4	6%
Staying the same	5	7%
Increasing	5	7%
Not applicable	57	80%
Total	71	

Survey Participants: 80
Question Respondents: 71
No Response Count: 9
Response Rate: 89%

Figure 44: Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
1 - 9%	13	29%
10 - 25%	14	31%
26 - 50%	6	13%
51 - 75%	8	18%
76 - 100%	4	9%
Total	45	

Survey Participants: 80
Question Respondents: 45
No Response Count: 35
Response Rate: 56%

Figure 45: Source of Majority of Sales	Count	Percent of Question Respondents
Local	55	74%
Provincial	4	5%
National	4	5%
United States	0	0%
International	3	4%
Total	66	

Figure 45b: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents
0%	16	57.14%
1-9%	4	14.29%
10-19%	4	14.29%
50-59%	1	3.57%
70-79%	2	7.14%
100%	1	3.57%
Total	28	

Survey Participants: 80
 Question Respondents: 28
 No Response Count: 52
 Response Rate: 35%

Figure 45c: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
0%	7	21.88%
1-9%	13	40.62%
10-19%	5	15.62%
20-29%	3	9.38%
30-39%	2	6.25%
40-49%	1	3.12%
50-59%	1	3.12%
Total	32	

Survey Participants: 80
 Question Respondents: 32
 No Response Count: 48
 Response Rate: 40%

Figure 45d: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
0%	4	10.26%
1-9%	11	28.21%

10-19%	10	25.64%
20-29%	5	12.82%
30-39%	2	5.13%
40-49%	2	5.13%
50-59%	1	2.56%
60-69%	1	2.56%
70-79%	1	2.56%
80-89%	1	2.56%
90-99%	1	2.56%

Total 39

Survey Participants: 80

Question Respondents: 39

No Response Count: 41

Response Rate: 49%

Figure 45e: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
0%	3	6.67%
1-9%	9	20.00%
10-19%	16	35.56%
20-29%	6	13.33%
30-39%	4	8.89%
40-49%	2	4.44%
50-59%	1	2.22%
70-79%	2	4.44%
90-99%	1	2.22%
100%	1	2.22%
Total	45	

Survey Participants: 80

Question Respondents: 45

No Response Count: 35

Response Rate: 56%

Figure 45f: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
0%	3	4.05%

1-9%	3	4.05%
10-19%	3	4.05%
20-29%	1	1.35%
30-39%	3	4.05%
40-49%	1	1.35%
50-59%	5	6.76%
60-69%	4	5.41%
70-79%	6	8.11%
80-89%	8	10.81%
90-99%	9	12.16%
100%	28	37.84%
Total	74	

Survey Participants: 80
 Question Respondents: 74
 No Response Count: 6
 Response Rate: 92%

Figure 46: International trade status	Count	Percent of Question Respondents
Export	14	18%
Import	28	35%
None	28	35%
Not applicable	16	20%
Total	86	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 47: Do you engage in government procurement?	Count	Percent of Question Respondents
Yes	14	18%
No	65	82%
Total	79	

Survey Participants:	80	
Question Respondents:	79	
No Response Count:	1	
Response Rate:	99%	

Figure 48: Source of Majority of Supplies	Count	Percent of Question Respondents
Local	29	48%
Provincial	14	23%
National	10	16%
United States	3	5%
International	1	2%
Total	57	

Figure 48b: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
0%	1	1.64%
1-9%	5	8.20%
10-19%	9	14.75%
20-29%	7	11.48%
40-49%	3	4.92%
50-59%	7	11.48%
60-69%	1	1.64%
70-79%	1	1.64%
80-89%	5	8.20%
90-99%	8	13.11%
100%	14	22.95%
Total	61	

Survey Participants:	80
Question Respondents:	61
No Response Count:	19
Response Rate:	76%

Figure 48c: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
0%	2	4.00%
1-9%	3	6.00%
10-19%	8	16.00%
20-29%	10	20.00%
30-39%	6	12.00%
40-49%	1	2.00%
50-59%	8	16.00%
60-69%	2	4.00%
70-79%	1	2.00%
80-89%	2	4.00%
90-99%	1	2.00%
100%	6	12.00%
Total	50	

Survey Participants: 80
 Question Respondents: 50
 No Response Count: 30
 Response Rate: 62%

Figure 48d: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
0%	5	9.80%
1-9%	6	11.76%
10-19%	10	19.61%
20-29%	11	21.57%
30-39%	7	13.73%
40-49%	1	1.96%
50-59%	1	1.96%
60-69%	1	1.96%
70-79%	5	9.80%
80-89%	1	1.96%
90-99%	1	1.96%
100%	2	3.92%
Total	51	

Survey Participants: 80
 Question Respondents: 51
 No Response Count: 29
 Response Rate: 64%

Figure 48e: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
0%	3	7.69%
1-9%	7	17.95%
10-19%	14	35.90%
20-29%	5	12.82%
30-39%	1	2.56%
40-49%	5	12.82%
50-59%	1	2.56%
60-69%	2	5.13%
70-79%	1	2.56%
Total	39	

Survey Participants: 80
 Question Respondents: 39
 No Response Count: 41
 Response Rate: 49%

Figure 48f: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
0%	19	70.37%
1-9%	1	3.70%
10-19%	3	11.11%
30-39%	1	3.70%
50-59%	2	7.41%
80-89%	1	3.70%
Total	27	

Survey Participants: 80
 Question Respondents: 27
 No Response Count: 53
 Response Rate: 34%

Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	51	65%
No	28	35%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?	Count	Percent of Question Respondents
Bags	1	2.50%
Bees	1	2.50%
Bookstore	1	2.50%
Bottles	1	2.50%
Cleaning Products	1	2.50%
Clothing racks	1	2.50%
Construction supplies	1	2.50%
Food	1	2.50%
Local produce	1	2.50%
Lumber	1	2.50%
Mining Equipment	1	2.50%
Plastics	1	2.50%
Refrigeration Truck Service	1	2.50%
Technology Support	1	2.50%
Tractor parts	1	2.50%
Training Services	1	2.50%
Art supplies	2	5.00%
Construction materials	2	5.00%
Printing services	2	5.00%
Packaging Supplies and Services	3	7.50%
Produce	5	12.50%

Farming Supplies	7	17.50%
Total	37	

Survey Participants: 80
Question Respondents: 40
No Response Count: 40
Response Rate: 50%

Figure 49: 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
Loyalty to current supplier	3	4%
Unaware of local vendors	3	4%
No control	7	10%
head office decision	7	10%
Quality of available products	8	12%
Higher costs locally	12	17%
No applicable to this business	12	17%
Product not available here	48	70%
Other	5	7%
Total	105	

Survey Participants: 80
Question Respondents: 69
No Response Count: 11
Response Rate: 86%

Figure 49b: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If <i>Other</i>, specify	Count	Percent of Question Respondents

Franchise restrictions	1	1.45%
Local vendors already have avenues for their product	1	1.45%
Selection (variety)	1	1.45%
Unique products	1	1.45%
Total	4	

Survey Participants: 80

Question Respondents: 4

No Response Count: 1

Parent Question 'Other' Respondents: 5

Parent Question Respondents: 69

Response Rate: 80%

Figure 50: What types of financing has your company used in the past to meet your financial capital needs?	Count	Percent of Question Respondents
Capital Financiers (money is given in exchange for shares of ownership)	16	21.05%
Lending (Pay back with predetermined interest rate)	53	69.74%
Internal	64	84.21%
Total	133	

Survey Participants: 78

Question Respondents: 76

No Response Count: 2

Response Rate: 97%

Figure 50b: If Internal, please specify	Count	Percent of Question Respondents
Personal Savings	43	70.49%
Retained Earnings	43	70.49%
Total	86	

Survey Participants: 78
 Question Respondents: 61
 No Response Count: 3
 Parent Question
 'Internal' Respondents: 64
 Parent Question
 Respondents: 76
 Response Rate: 95%

Figure 51: If Lending, please specify	Count	Percent of Question Respondents
Vendor credit	9	16.98%
Private loan	11	20.75%
Credit cards	29	54.72%
Bank loan	32	60.38%
Line of credit	32	60.38%
Other	5	9.43%
Total	118	

Survey Participants: 78
 Question Respondents: 53
 No Response Count: 0
 Parent Question
 'Lending' Respondents: 53
 Parent Question
 Respondents: 76
 Response Rate: 100%

Figure 51b: What types of financing has your company used in the past to meet your financial capital needs?: If <i>Other</i>, please explain	Count	Percent of Question Respondents
Financial institutions other than banks.	1	1.89%
Home Hardware Corporate	1	1.89%
Mortgage	1	1.89%
Grants	2	3.77%
Total	5	

Survey Participants: 78
 Question Respondents: 5
 No Response Count: 0
 Parent Question 'Other' Respondents: 5
 Parent Question Respondents: 53
 Response Rate: 100%

Figure 52: If Capital Financiers, please specify	Count	Percent of Question Respondents
Friends	1	6.25%
Other businesses	1	6.25%
Small individual investors	1	6.25%
Family	7	43.75%
Other	9	56.25%
Total	19	

Survey Participants: 78
 Question Respondents: 16
 No Response Count: 0
 Parent Question 'Capital Financiers' Respondents: 16
 Parent Question Respondents: 76
 Response Rate: 100%

Figure 52b: What types of financing has your company used in the past to meet your financial capital needs?: If <i>Other</i>, please explain	Count	Percent of Question Respondents
Community Future Self Employment Program	1	6.25%
Grants	1	6.25%
Home Hardware Corporate	1	6.25%
Municipal Finance Authority	1	6.25%
One investor	1	6.25%
Parent company	1	6.25%
Shareholders' group	1	6.25%
Some donations to purchase equipment.	1	6.25%
Tax payers' money	1	6.25%
Total	9	

Survey Participants: 78
 Question Respondents: 8
 No Response Count: 1
 Parent Question 'Other' Respondents: 9
 Parent Question Respondents: 16
 Response Rate: 89%

Figure 53: Have you experienced any barriers to accessing financial capital in the past, or that you foresee in the future, that you wish to identify?	Count	Percent of Question Respondents
Local lenders and capital financiers not available	4	16.00%
Local sources are exhausted	4	16.00%
Insufficient earnings or collateral to interest external sources (lending or capital financing)	11	44.00%

Other	9	36.00%
Total	28	

Survey Participants: 78
 Question Respondents: 25
 No Response Count: 53
 Response Rate: 32%

Figure 53b: If <i>Other</i>, please explain	Count	Percent of Question Respondents
Don't know big picture for parent company.	1	4.00%
East Shore is viewed as a higher risk area due to economic stagnation, poor internet and local core businesses.	1	4.00%
In the past process for obtaining financing much simpler and less expensive than it is now.	1	4.00%
Lack of interest in loaning money.	1	4.00%
Local lending institution wanted a larger down payment	1	4.00%
Not understanding non-profit sector	1	4.00%
Too Risky	1	4.00%
Total	7	

Survey Participants: 78
 Question Respondents: 7
 No Response Count: 2
 Parent Question 'Other' Respondents: 9
 Parent Question Respondents: 25
 Response Rate: 78%

Figure 54: Do you expect to be in need of financial capital in the next 1 to 3 years?	Count	Percent of Question Respondents
Yes	32	43.84%
No	41	56.16%
Total	73	

Survey Participants: 78
 Question Respondents: 73
 No Response Count: 5
 Response Rate: 94%

Figure 54b: If Yes, please indicate its purpose	Count	Percent of Question Respondents
Expanding/Improving Human Resources	2	6.25%
Maintaining operational expenses	4	12.50%
Expanding/Improving Land/building	21	65.62%
Expanding/Improving Equipment (technology; machinery; vehicles)	25	78.12%
Other	1	3.12%
Total	53	

Survey Participants: 78
 Question Respondents: 32
 No Response Count: 0
 Parent Question 'Yes' Respondents: 32
 Parent Question Respondents: 73
 Response Rate: 100%

Figure 54c: If <i>Other</i>, please explain	Count	Percent of Question Respondents
Expanding/improving product line	1	3.12%
Total	1	

Survey Participants: 78
 Question Respondents: 1
 No Response Count: 0
 Parent Question 'Other' Respondents: 1
 Parent Question Respondents: 32
 Response Rate: 100%

Figure 55: Have you determined how you will access this financial capital?	Count	Percent of Question Respondents
Yes	17	51.52%
Not at this time	16	48.48%
Total	33	

Survey Participants: 78
 Question Respondents: 33
 No Response Count: 45
 Response Rate: 42%

Figure 55b: If Yes, please check all that apply	Count	Percent of Question Respondents
Capital Financiers (money is given in exchange for shares of ownership)	2	11.76%
Lending (Pay back with predetermined interest rate)	8	47.06%

Internal	13	76.47%
Total	23	

Survey Participants: 78
 Question Respondents: 17
 No Response Count: 0
 Parent Question 'Yes' Respondents: 17
 Parent Question Respondents: 33
 Response Rate: 100%

Figure 55c: If Internal, please specify	Count	Percent of Question Respondents
Personal Savings	7	53.85%
Retained Earnings	10	76.92%
Total	17	

Survey Participants: 78
 Question Respondents: 13
 No Response Count: 0
 Parent Question 'Internal' Respondents: 13
 Parent Question Respondents: 17
 Response Rate: 100%

Figure 55d: If Lending, please specify	Count	Percent of Question Respondents
Credit cards	1	12.50%
Private loan	1	12.50%
Line of credit	3	37.50%
Bank loan	5	62.50%
Other	2	25.00%
Total	12	

Survey Participants: 78
 Question Respondents: 8

No Response Count: 0
 Parent Question
 'Lending' Respondents: 8
 Parent Question
 Respondents: 17
 Response Rate: 100%

Figure 55e: What types of financing has your company used in the past to meet your financial capital needs?: If <i>Other</i>, please explain	Count	Percent of Question Respondents
BC Housing, CBT Impact Fund	1	50.00%
Financial institution	1	50.00%
Total	2	

Survey Participants: 78
 Question Respondents: 2
 No Response Count: 76
 Response Rate: 3%

Figure 55f: If Capital Financiers, please specify	Count	Percent of Question Respondents
Family, Small individual investors, Other businesses, Other	1	50.00%
Other	1	50.00%
Total	2	

Survey Participants: 78
 Question Respondents: 2
 No Response Count: 0
 Parent Question ' Capital Financiers' Respondents: 2
 Parent Question
 Respondents: 17
 Response Rate: 100%

Figure 55g: What types of financing has your company used in the past to meet your financial capital needs?: If <i>Other</i>, please explain	Count	Percent of Question Respondents
Foundations (E. Kootenay and Creston Foundation), Donations	1	50.00%
One financier	1	50.00%
Total	2	

Survey Participants: 78
 Question Respondents: 2
 No Response Count: 0
 Parent Question 'Other' Respondents: 2
 Parent Question Respondents: 2
 Response Rate: 100%

Figure 56: If you were to access financial capital, how much capital would you require?	Count	Percent of Question Respondents
\$50K to \$100K	6	11.32%
\$25K to \$50K	7	13.21%
\$25K or less	17	32.08%
\$100K or more	23	43.40%
Total	53	

Survey Participants: 78
 Question Respondents: 53
 No Response Count: 25
 Response Rate: 68%

Figure 57: If a mechanism existed to enable your community to invest directly into local businesses, would you consider accessing financial capital from it?	Count	Percent of Question Respondents

Yes, I would offer equity in my business	4	5.19%
I am not sure	10	12.99%
No, I would not use this mechanism	30	38.96%
Yes, I would access a loan	33	42.86%
Total	77	

Survey Participants: 78
 Question Respondents: 77
 No Response Count: 1
 Response Rate: 99%

Figure 58: What return on investment could you offer?: Social (how do you help people)	Count	Percent of Question Respondents
A place to live	1	3.70%
Advertising	1	3.70%
Assist with child learning	1	3.70%
Boost morale	1	3.70%
Donate to food bank	1	3.70%
Employ disabled	1	3.70%
Enhance learning facilities	1	3.70%
Grow food	1	3.70%
Mentor organic growers	1	3.70%
Organic produce	1	3.70%
Raise family	1	3.70%
Share resources.	1	3.70%
Start a business	1	3.70%
Training	4	14.81%
Employment	15	55.56%
Total	32	

Survey Participants: 78
 Question Respondents: 27
 No Response Count: 51
 Response Rate: 35%

Figure 59: What return on investment could you offer?: Financial (% return)	Count	Percent of Question Respondents
15%	1	5.88%
2%	1	5.88%
3%	1	5.88%
6%	1	5.88%
8%	1	5.88%
4%	2	11.76%
5%	8	47.06%
Total	15	

Survey Participants: 78
 Question Respondents: 17
 No Response Count: 61
 Response Rate: 22%

Figure 60: What return on investment could you offer?: Environmental (how you help the environment)	Count	Percent of Question Respondents
- environmentally friendly operating practices golf course.\n- environmental stewardship.\n- note re "Financial (% return)" section above: would offer% but exact% not indicated.	1	3.85%
Gray water recovery	1	3.85%
Grow local produce	1	3.85%
Improve soil health	1	3.85%
Reduce herbicide usage	1	3.85%
Reduce pesticide usage	1	3.85%
Reduced energy usage	1	3.85%
Repurpose product line	1	3.85%
Sustainable food production	1	3.85%
Waste reduction	1	3.85%
Green energy	2	7.69%

Maintain land	2	7.69%
Recycling	2	7.69%
Water conservation	2	7.69%
Increase agriculture	3	11.54%
Energy efficiency	6	23.08%
Follow environmental practices	7	26.92%
Total	34	

Survey Participants: 78
 Question Respondents: 26
 No Response Count: 52
 Response Rate: 33%

FACILITIES AND EQUIPMENT

Figure 61: What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents
less than 1,000 sq ft	13	18%
1,000-4,999 sq ft	33	45%
5,000-9,999 sq ft	7	10%
10,000-19,999 sq ft	9	12%
20,000 sq ft or more	11	15%
Total	73	

Survey Participants: 80
 Question Respondents: 73
 No Response Count: 7
 Response Rate: 91%

Figure 62: Condition of facility	Count	Percent of Question Respondents
Excellent	24	30%
Good	43	54%
Fair	13	16%
Total	80	

Survey Participants:	80	
Question	80	
Respondents:		
No Response Count:	0	
Response Rate:	100%	

Figure 63: Condition of equipment	Count	Percent of Question Respondents
Excellent	26	33%
Good	41	51%
Fair	12	15%
Poor	1	1%
Total	80	

Survey Participants:	80
Question	80
Respondents:	
No Response Count:	0
Response Rate:	100%

Figure 64: Status of facility	Count	Percent of Question Respondents
Leased	17	22%
Owned	62	78%
Total	79	

Survey Participants:	80
Question	79
Respondents:	
No Response Count:	1
Response Rate:	99%

Figure 65: Status of facility: If <i>Leased</i>, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	1	13%

1-2 Years	3	38%
3-5 Years	1	13%
>5 Years	3	38%
Total	8	

Survey Participants: 80

Question Respondents: 8

No Response Count: 9

Parent Question 'Leased' Respondents: 17

Parent Question Respondents: 79

Figure 65b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	16	94.12%
No	1	5.88%
Total	17	

Survey Participants: 80

Question Respondents: 17

No Response Count: 0

Parent Question 'Leased' Respondents: 17

Parent Question Respondents: 79

Response Rate: 100%

Figure 66: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	12	16%
Own	65	84%
Total	77	

Survey Participants: 80
 Question Respondents: 77
 No Response Count: 3
 Response Rate: 96%

Figure 67: Historical investment trends: Over past 18 months in the <i>facility</i>	Count	Percent of Question Respondents
Declining	6	8%
Staying the same	35	47%
Increasing	33	45%
Total	74	

Survey Participants: 80
 Question Respondents: 74
 No Response Count: 6
 Response Rate: 92%

Figure 68: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	55	69%
No	21	26%
Maybe	4	5%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 69: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	34	43%
No	46	58%

Total	80	
--------------	----	--

Survey Participants: 80
Question Respondents: 80
No Response Count: 0
Response Rate: 100%

Figure 69b: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	33	41.25%
No	47	58.75%
Total	80	

Survey Participants: 80
Question Respondents: 80
No Response Count: 0
Response Rate: 100%

Figure 70: 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	24	73%
No	9	27%
Total	33	

Survey Participants: 80
Question Respondents: 33
No Response Count: 1
Parent Question 'Yes' Respondents: 34
Parent Question Respondents: 80

Figure 71: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents
Yes	31	94%
No	2	6%
Total	33	

Survey Participants: 80

Question Respondents: 33

No Response Count: 1

Parent Question 'Yes' Respondents: 34

Parent Question Respondents: 80

Figure 72: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	3	12%
\$25,000-\$99,999	8	31%
\$100,000-\$499,999	7	27%
\$500,000-\$999,999	5	19%
\$1-\$4.9 million	3	12%
Total	26	
Survey Participants:	80	

Question Respondents: 26

No Response Count: 8

Parent Question 'Yes' Respondents: 34

Parent Question Respondents: 80

Response Rate: 76%

Figure 73: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
Under 50%	14	50%
50 to 99%	8	29%
100%	6	21%
Total	28	

Survey Participants: 80
 Question Respondents: 28
 No Response Count: 6
 Parent Question 'Yes' Respondents: 34
 Parent Question Respondents: 80
 Response Rate: 82%

Figure 74: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents
0%	3	12%
Under 50%	3	12%
50 to 99%	19	73%
100%	1	4%
Total	26	

Survey Participants: 80
 Question Respondents: 26
 No Response Count: 8
 Parent Question 'Yes' Respondents: 34
 Parent Question Respondents: 80
 Response Rate: 76%

Figure 75: 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	5	25%
1,000 to 4,999 sq ft	13	65%
5,000-9,999 sq ft	2	10%
Total	20	
Survey Participants:	80	

Question Respondents: 20
 No Response Count: 14
 Parent Question 'Yes' Respondents: 34
 Parent Question Respondents: 80
 Response Rate: 59%

Figure 76: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	56	70%
No	24	30%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 76b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	11	20.37%
6	11	20.37%
12	11	20.37%

18	7	12.96%
24	6	11.11%
36	8	14.81%
Total	54	

Survey Participants: 80
 Question Respondents: 54
 No Response Count: 2
 Parent Question 'Yes' Respondents: 56
 Parent Question Respondents: 80
 Response Rate: 96%

Figure 77: Planning any upgrades to the facility?	Count	Percent of Question Respondents
Yes	46	59%
No	32	41%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 77b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	8	17.78%
6	11	24.44%
12	14	31.11%
18	4	8.89%
24	7	15.56%
36	1	2.22%

Total 45

Survey Participants: 80
 Question Respondents: 45
 No Response Count: 1
 Parent Question 'Yes' Respondents: 46
 Response Rate: 98%

Figure 78: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Low return on investment	1	13%
Marketing	1	13%
Space	3	38%
Financing	4	50%
Total	9	

Survey Participants: 80
 Question Respondents: 8
 No Response Count: 24
 Parent Question 'No' Respondents: 32
 Parent Question Respondents: 78
 Response Rate: 25%

Figure 79: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Broadband access	3	9%
Energy reliability	3	9%
Warehousing	3	9%
Lack of suitable premises	5	15%
Transport/freight	5	15%

Energy costs	7	21%
Local regulations e.g. zoning	9	27%
Other (please specify):	9	27%
Lack of skilled staff	10	30%
Identifying and accessing new markets	12	36%
Finance	26	79%
Total	92	

Survey Participants: 80
 Question Respondents: 33
 No Response Count: 1
 Parent Question 'Yes' Respondents: 34
 Parent Question Respondents: 80
 Response Rate: 97%

Figure 79b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
Competition	1	11.11%
Funding	1	11.11%
Government restrictions	1	11.11%
Refrigeration	1	11.11%
Weather	1	11.11%
Skilled Workforce	2	22.22%
Time Constraints	2	22.22%
Total	9	

Survey Participants: 80
 Question Respondents: 9

No Response Count: 0
 Parent Question
 'Other (please specify):'
 Respondents:
 Parent Question
 Respondents: 33
 Response Rate: 100%

Figure 80: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	11	32.35%
No	23	67.65%
Total	34	

Survey Participants: 80
 Question Respondents: 34
 No Response Count: 46
 Response Rate: 42%

Figure 80b: If Yes, which have you approached?	Count	Percent of Question Respondents
BC Hydro	1	10%
Local Economic Development Office	1	10%
Chamber of Commerce	2	20%
Community Futures	2	20%
Local Council	2	20%
Other (please specify):	7	70%
Total	15	

Survey Participants: 80

Question Respondents: 10
 No Response Count: 1
 Parent Question 'Yes' Respondents: 11
 Parent Question Respondents: 34
 Response Rate: 91%

Figure 80c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
BBA	1	10.00%
BC Housing	1	10.00%
BC Non-profit Housing	1	10.00%
Banker	1	10.00%
CBT and other Foundations	1	10.00%
Federal Government	1	10.00%
Federal/Provincial Replant Program	1	10.00%
Regional Directors (MP & MLA)	1	10.00%
Regional District (Area B)	1	10.00%
CBT	2	20.00%
Regional District	2	20.00%
Total	13	

Survey Participants: 80
 Question Respondents: 7
 No Response Count: 0
 Parent Question 'Other' Respondents: 7
 Parent Question Respondents: 10
 Response Rate: 100%

Figure 81: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	35	64%
No	20	36%
Total	55	

Survey Participants: 80
 Question Respondents: 55
 No Response Count: 25
 Response Rate: 69%

Figure 82: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	57	71%
No	23	29%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

GOVERNMENT SERVICES

Figure 83: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	70	89%	6	8%	2	3%	1	1%	0	0%	79
Access to US Border	2	3%	0	0%	1	1%	30	38%	47	59%	80
Access to airport facilities	12	15%	19	24%	23	29%	21	27%	4	5%	79
Access to highway/ roads	0	0%	1	1%	7	9%	50	63%	22	28%	80
Access to markets	1	1%	8	10%	23	29%	35	44%	13	16%	80
Access to suppliers	1	1%	15	19%	26	33%	29	36%	9	11%	80
Availability of appropriately zoned land	27	36%	10	13%	11	15%	23	31%	4	5%	75
Availability of buildings for lease or purchase	46	59%	10	13%	6	8%	14	18%	2	3%	78
Availability of rail transport	68	88%	8	10%	1	1%	0	0%	0	0%	77
Availability of road transport services	0	0%	15	19%	20	25%	34	43%	11	14%	80
Availability of warehousing	57	74%	5	6%	2	3%	12	16%	1	1%	77

Development approval process	23	29%	4	5%	10	13%	33	42%	8	10%	78
Disposal of waste material	12	15%	7	9%	12	15%	40	50%	9	11%	80
Inspections /licensing	6	8%	6	8%	9	11%	49	62%	9	11%	79
Recycling	0	0%	6	8%	13	16%	40	50%	21	26%	80
Telecommunications (internet, cell)	0	0%	6	8%	15	19%	44	55%	15	19%	80
Water and sewerage supply	3	4%	5	6%	14	18%	50	63%	7	9%	79

Survey Participants: 80

Figure 83b: Please rate the following: Other (please specify)	Please rate the following: Other (please specify)	Count	Percent of Question Respondents
BC Ambulance Service	Excellent	1	5.00%
Banking options	Good	1	5.00%
CFIA	Poor	1	5.00%
Conferences & professional development opportunities	Poor	1	5.00%
Farm Extension Office	Poor	1	5.00%
Ferry service - Kootenay Lake	Good	1	5.00%
Gov't Agriculture Extension Office	Poor	1	5.00%
KES	Excellent	1	5.00%
Liquor inspections & licensing	Poor	1	5.00%
Local Post Office	Fair	1	5.00%
Medical	Fair	2	10.00%
Port-facilities on BC's west coast	Poor	1	5.00%
Postal Service	Excellent	1	5.00%
Provincial and Federal Co-Op Development Services	Poor	1	5.00%
Recycling of farm plastics	Poor	1	5.00%

Regional director for the area	Excellent	1	5.00%
Traffic routes	Poor	1	5.00%
YRB	Poor	2	10.00%
Total		20	100.00%

Survey Participants: 80
 Question Respondents: 20
 No Response Count: 60
 Response Rate: 25%

84: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	44	56.41%
No	34	43.59%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 84b: 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
Create a cooperative trucking company	1	2.27%
Develop an industrial park	1	2.27%
Establish a farm recycling facility	1	2.27%
Fire station	1	2.27%
Improve food processing infrastructure	1	2.27%
Increase Border Crossing Services	1	2.27%
Increase Population	1	2.27%
Increased telecommunications competition	1	2.27%

Remove toll on truckers	1	2.27%
Shipping services Central delivery location	1	2.27%
Airport service	2	4.55%
Establish a composting facility	2	4.55%
Improve Rail Services	2	4.55%
Move non-farmable land out of the ALR	2	4.55%
Build a Farm Extension Office	3	6.82%
Increase CFIA services	3	6.82%
Increase Water Services	3	6.82%
More Recycling Services	3	6.82%
Shipping services	3	6.82%
Expand high speed internet services	4	9.09%
Improve Highway services / infrastructure	5	11.36%
Total	42	
Survey Participants:	80	
Question Respondents:	44	
No Response Count:	0	
Parent Question 'Yes' Respondents:	44	

Parent Question Respondents: 78

Response Rate: 100%

Figure 85: Which airport services do you use?	Count	Percent of Question Respondents
Bonnars Ferry	1	1%
Edmonton	1	1%
Kelowna	1	1%
Vancouver	4	6%
Creston	5	7%
Trail	5	7%
Calgary	10	15%
Castlegar	11	16%

Spokane	19	28%
Cranbrook	55	82%
Total	112	

Survey Participants:	80
Question Respondents:	67
No Response Count:	13
Response Rate:	84%

Figure 86: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Air shuttle to Vancouver	1	2.94%
Airport service to Cranbrook	1	2.94%
Coffee Shop	1	2.94%
Improve traffic control	1	2.94%
Medivac	1	2.94%
Pacific Coastal Air flights	1	2.94%
Cranbrook	2	5.88%
Improvements to navigational aids	2	5.88%
More Airlines	2	5.88%
Freight shipping	3	8.82%
Local flights to Calgary and Vancouver	3	8.82%
Calgary	4	11.76%
Scheduled flights	17	50.00%
Total	39	

Survey Participants:	80
Question Respondents:	34
No Response Count:	46
Response Rate:	42%

BUSINESS CLIMATE

Figure 87: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	1	1%
Good	29	37%
Fair	43	55%

Poor	5	6%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 88: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Chamber of Commerce	6	8%	7	9%	12	15%	50	63%	5	6%	80
Colleges/Universities	8	10%	11	14%	23	29%	36	45%	2	3%	80
Community Futures	23	29%	1	1%	8	10%	42	53%	5	6%	79
Cultural/Recreational Amenities	2	3%	5	6%	12	15%	44	55%	17	21%	80
Economic Development	7	9%	15	19%	30	38%	27	34%	1	1%	80
Housing	10	13%	9	11%	22	28%	38	48%	0	0%	79
K-12 education	13	16%	5	6%	13	16%	42	53%	7	9%	80
Local Government	4	5%	6	8%	21	26%	48	60%	1	1%	80
Local Tax Structure	7	9%	12	15%	23	29%	35	44%	3	4%	80
Technical Training	17	22%	27	34%	18	23%	17	22%	0	0%	79
Tourism services	9	11%	3	4%	19	24%	44	55%	5	6%	80
Workforce Availability	1	1%	12	15%	35	44%	31	39%	1	1%	80
Workforce Quality	1	1%	6	8%	25	31%	43	54%	5	6%	80
Workforce Stability	5	6%	7	9%	35	44%	29	37%	3	4%	79

Survey Participants: 80

Figure 89: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	39	51%
No change	18	23%
Worse today	11	14%
No opinion	9	12%
Total	77	

Survey Participants: 80
 Question Respondents: 77
 No Response Count: 3
 Response Rate: 96%

Figure 89b: Please compare the local business climate today versus 5 years ago: If worse today, why?	Count	Percent of Question Respondents
Exchange rate	1	9.09%
Government cutbacks	1	9.09%
Increasing Competition	1	9.09%
Increasing cost of water	1	9.09%
Loss of large farm feed store	1	9.09%
Out of town shopping	1	9.09%
Reduction in tourism	1	9.09%
Declining economy	4	36.36%
Total	11	

Survey Participants: 80
 Question Respondents: 11
 No Response Count: 0
 Parent Question 'Worse today' Respondents: 11
 Parent Question Respondents: 77
 Response Rate: 100%

Figure 90: 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	47	60%
No change	19	24%
Will be worse	4	5%
No opinion	8	10%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%

Figure 91: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Diverse economy	1	1%
Good restaurants	1	1%
Great pride	1	1%
Low crime	1	1%
Networking	1	1%
Diversity of products	2	3%
Loyal Customers	2	3%
Recreational opportunities	2	3%
Lifestyle	3	4%
Tourism	3	4%
Agriculture	4	5%
Proximity to US	5	7%
Workforce	5	7%
Climate	8	11%
Location	11	14%
Supportive community	35	46%
Total	85	
Survey Participants:	80	
Question Respondents:	76	

No Response Count:	4	
Response Rate:	95%	

Figure 92: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Affordable housing	1	1%
Agriculture market saturation	1	1%
Customer service	1	1%
Decline in tourism	1	1%
High commercial rent	1	1%
Lack of growth	1	1%
Lack of water	1	1%
Laid back attitude	1	1%
Low average income	1	1%
Poor internet service	1	1%
Skilled labour	1	1%
Small market	1	1%
Tax structure	1	1%
Too dependent on tourism	1	1%
Training	1	1%
Vacant commercial buildings	1	1%
Inaccessible government services	2	3%
Lack of amenities	2	3%
Poor customer service	2	3%
Aging population	3	4%
Transportation costs	3	4%
Underground economy	3	4%
Lack of suppliers	4	5%
Resistance to change	4	5%
Low population	13	17%
Isolated location	15	19%
Proximity to US	15	19%
Total	82	

--	--	--

Survey Participants: 80

Question Respondents: 78

No Response Count: 2

Response Rate: 98%

Figure 93: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	65	81.25%
No	15	18.75%
Total	80	

Survey Participants: 80

Question Respondents: 80

No Response Count: 0

Response Rate: 100%

Figure 93b: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Affordable housing	1	2%
Internet access	1	2%
Lack of jobs	1	2%
Lack water	1	2%
Limited services	1	2%
Low income levels	1	2%
Tax structure	1	2%
Transportation	1	2%
Economy	2	3%
Lack of planning	2	3%
Small market	2	3%

ALR Restrictions	3	5%
Access to markets	3	5%
Aging population	3	5%
Skilled labour	3	5%
Economic seasonality	4	6%
Land availability	4	6%
Resistance to change	6	9%
Isolated location	11	17%
Low population	13	20%
Total	64	

Survey Participants:	80
Question Respondents:	65
No Response Count:	0
Parent Question 'Yes' Respondents:	65
Parent Question Respondents:	80
Response Rate:	100%

Figure 94: 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	48	71%	1	1%	1	1%	4	6%	8	12%	6	9%	68
Chamber of Commerce	14	18%	2	3%	4	5%	13	17%	35	46%	8	11%	76
College Industry Liaison Officer	64	91%	0	0%	1	1%	1	1%	3	4%	1	1%	70
Community Futures	29	40%	3	4%	1	1%	6	8%	24	33%	10	14%	73
Continuing Education and Workforce Training	18	24%	1	1%	1	1%	9	12%	41	55%	5	7%	75
Economic Development Organization / Commission	50	72%	0	0%	2	3%	4	6%	10	14%	3	4%	69
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	60	87%	0	0%	2	3%	3	4%	4	6%	0	0%	69
Invest Kootenay	55	89%	1	2%	1	2%	2	3%	3	5%	0	0%	62
Kootenay Aboriginal Business Advocates Society	63	91%	0	0%	0	0%	2	3%	4	6%	0	0%	69
Scientific Research and Experimental Development Tax Incentive Program	65	97%	0	0%	0	0%	1	1%	1	1%	0	0%	67

Survey Participants: 80

Figure 95: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	23	29.11%
No	56	70.89%
Total	79	

Survey Participants: 80
 Question Respondents: 79
 No Response Count: 1
 Response Rate: 99%

Figure 95b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Distribution center	1	6%
Greenhouse	1	6%
Local food hub	1	6%
Manufacturers	1	6%
Technology companies	1	6%
Packaging materials	2	13%
Agricultural suppliers	8	50%
Total	15	

Survey Participants: 80
 Question Respondents: 16
 No Response Count: 7
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 79
 Response Rate: 70%

Figure 96: Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Art gallery	1	2%

Automotive	1	2%
Beef and dairy industry	1	2%
Childcare services	1	2%
Community kitchen	1	2%
Large greenhouse	1	2%
Micro brewery	1	2%
Organic farmers	1	2%
Retail Stores	1	2%
Technology businesses	2	3%
Food Distributors	3	5%
Forestry	3	5%
Senior Services	3	5%
Construction	4	6%
Health and Wellness	4	6%
Agriculture value-added industries	15	24%
Tourism	19	31%
Total	62	

Survey Participants: 80

Question Respondents: 62

No Response Count: 18

Response Rate: 78%

Figure 97: Business competitiveness factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important	Respondents
Access to exporting and international markets	31	39%	22	28%	27	34%	80
Accessing capital	6	8%	22	28%	50	64%	78
Add or change in business, products or services	13	16%	5	6%	62	78%	80
Affordable shipping/freight	3	4%	11	14%	66	83%	80
Availability of telecommunications infrastructure and services	0	0%	4	5%	76	95%	80
Energy costs	1	1%	8	10%	70	89%	79
Exchange rate for Canadian dollar	1	1%	6	8%	73	91%	80
Expansion of workforce employees	9	11%	21	27%	49	62%	79
Improvement business management	1	1%	2	3%	76	96%	79
Improvement of customer services	8	10%	7	9%	65	81%	80
Improving worker productivity	6	8%	10	13%	64	80%	80

New market development locally	6	8%	11	14%	62	78%	79
New market development outside of region	10	13%	14	18%	54	69%	78
New product research and development	7	9%	8	10%	64	81%	79
Reliable air transportation	12	15%	44	55%	24	30%	80
Strategic alliances (joining with other businesses to provide products/services)	8	10%	17	21%	55	69%	80
Water/sewer availability	4	5%	8	10%	68	85%	80
Water/sewer costs	6	8%	14	18%	60	75%	80
Workforce skill development	2	3%	7	9%	70	89%	79
Workplace health and safety	0	0%	5	6%	73	94%	78

Survey Participants: 80

Figure 98: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	1	1%	7	10%	26	36%	29	40%	9	13%	72
Investing in people and skills	0	0%	4	5%	18	24%	37	50%	15	20%	74
Leadership and management capacity	1	1%	3	4%	14	19%	42	57%	14	19%	74
Measuring impact of productivity efforts/ investments	4	7%	7	12%	20	33%	21	35%	8	13%	60
Networking and collaboration with other businesses	3	4%	6	8%	16	21%	40	52%	12	16%	77
Organizing work (structures & processes)	1	1%	3	4%	15	22%	39	57%	10	15%	68
Productive workplace culture	1	1%	6	8%	13	17%	44	59%	11	15%	75

Survey Participants: 80

Figure 99: 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
Government	2	3%
Education	3	4%
Technology-based businesses	6	8%
Manufacturing	8	10%
Construction	10	13%
Arts	16	20%
Green or environmental businesses	16	20%
culture and creative businesses	16	20%
Forestry	18	23%
Health & wellness	18	23%
Other niche service businesses (e.g. services to seniors)	21	26%
Relocation of people from urban centres	21	26%
Agriculture	47	59%
Tourism	53	66%
Other	22	28%
Total	277	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 99b: Please indicate which economic drivers have the greatest potential for growth in the	Count	Percent of Question Respondents
---	--------------	--

region over the next 5 to 10 years. (please pick top 3): If <i>Other</i> please specify		
Food	1	1.25%
Total	1	

Survey Participants: 80
 Question Respondents: 1
 No Response Count: 21
 Parent Question 'Other' Respondents: 22
 Parent Question Respondents: 80
 Response Rate: 5%

Figure 100: Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
Yes	44	55.00%
No	36	45.00%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 100b: Is your business impacted by its proximity to the Alberta border?: If Yes, please explain	Count	Percent of Question Respondents
Negative - Loss of sales to Alberta	1	2%
Positive - Alberta suppliers	1	2%
Positive - Workforce migration from Alberta	1	2%
Negative - Alberta has lower taxes	3	7%
Negative - Workforce migration to Alberta	4	9%

Positive - Alberta tourists	11	25%
Positive - Alberta customers	23	52%
Total	44	

Survey Participants: 80
 Question Respondents: 44
 No Response Count: 0
 Parent Question 'Yes' Respondents: 44
 Parent Question Respondents: 80
 Response Rate: 100%

ASSESSMENT AND PLANS

Figure 101: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	13	16%
Good	59	74%
Fair	7	9%
Poor	1	1%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 102: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	5	26%
Good	7	37%
Poor	1	5%

Not applicable	6	32%
Total	19	

Survey Participants: 80
Question Respondents: 19
No Response Count: 61
Response Rate: 24%

Figure 103: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	31	39%
Good	46	58%
Fair	1	1%
Poor	1	1%
Total	79	

Survey Participants: 80
Question Respondents: 79
No Response Count: 1
Response Rate: 99%

Figure 104: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	6	23%
Good	7	27%
Not applicable	13	50%
Total	26	

Survey Participants: 80
Question Respondents: 26
No Response Count: 54
Response Rate: 32%

Figure 105: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
High	3	4%
Moderate	8	10%
Low	69	86%
Total	80	

Survey Participants: 80
 Question Respondents: 80
 No Response Count: 0
 Response Rate: 100%

Figure 106: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	2	3%
Moderate	7	9%
Low	69	88%
Total	78	

Survey Participants: 80
 Question Respondents: 78
 No Response Count: 2
 Response Rate: 98%