



COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

*REPORT ON REVELSTOKE AND AREA BUSINESSES
FALL 2015*



COLUMBIA BASIN
RDI
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Community
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Revelstoke



The Business Retention and Expansion project was initiated by the Revelstoke Community Economic Development Department, in partnership with Community Futures Revelstoke and the Revelstoke Chamber of Commerce. .

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 135 businesses in the City of Revelstoke and surrounding area. 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 businesses are classified as 'Retail and Wholesale Trade', 'Accommodation and Food Services' and 'Arts, Entertainment and Recreation' under the North American Industry Classification System (NAICS).
	The lifestyle was the most frequently cited reason given for businesses to locate in Revelstoke.
	The vast majority of businesses provide services.
	Most businesses report that they are in a growing or maturing phase.
Local Workforce	Businesses most commonly reported that they employ less than five employees.
	The employment trends have historically remained the same and the full time employment trend is expected to remain the same in the future.
	The areas currently experiencing recruitment challenges include sales/retail, food/beverage service and hospitality service.
Sales	58% of businesses indicated that the market for their product or service is increasing.
	60% of businesses report that their sales are to customers within the local area.
	68% of all businesses indicate they supply products or services to companies within the local area.
Facilities and Equipment	63% of businesses lease the facility in which they operate.
	Nearly half of businesses plan to expand within 3 years, with 97% of those indicating that expansion will occur within the community.
	The top barrier to expansion is financing.
Government Services	Top rated government services include access to market, water and sewerage supply, and access to highways/roads.
	Improvements to highways, road quality and service, as well as improvements to communication services, were most commonly listed as most in need of improvement.
	The Kelowna International Airport is the most used airport by local businesses.
Business Climate	The overall business climate was rated as good by the majority of respondents, 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 and recreational amenities and K-12 education.
	Businesses most commonly listed Revelstoke's strong sense of community as its greatest strength as a place to do business.

	The most commonly cited barriers to growth are the isolated location, the low population and the development approval process.
Assessment and Plans	The overall health of their company was rated as excellent by 18% of businesses and good by 64% of businesses.
	Only 4% of businesses are at a high risk of closing, and only 2% are at a high 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:

Small to medium sized, locally owned businesses

The predominant business typology is small and medium sized, independently owned businesses. Actions to support and encourage small businesses would be most appropriate for this target market and could include specific training targeted to the needs of small and medium sized businesses, providing shared services to small businesses such as payroll, human resources, employee recruitment, bookkeeping, etc.

Employment

Findings indicate that employees under the age of 25 and over 50 are in the minority. Increasing youth and older worker involvement in the local workforce could be encouraged. Actions on this theme could involve gaining a better understanding of the reasons for the low employment rates for these age groups, connecting local businesses with relevant employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions. In addition to the age of employees, the survey findings indicate that 31% of employees are classed as ‘temporary’. Temporary employment can impose hidden costs on employers (higher training costs, poorer levels of service etc.) and employees (anxiety from uncertainty, inability to plan/save, etc.). While heavier reliance on ‘temporary’ employment may be unavoidable in resort towns, it may be beneficial to discuss the causes and costs of temporary employment with the business community. This would assist in better understanding the costs and any potential means of supporting both the business community and the local workforce.

Business Growth & Expansion

56% of businesses in the region report being in a growth cycle, and 48% indicate that they are planning to expand within the next three years. The majority of those businesses planning to expand feel their existing site is adequate, and the vast majority of expansion plans are expected to occur within the community. Businesses also report that employment rates are stable, with little change anticipated. Actions in this area could include exploring ways to support existing businesses as they plan for local expansion/growth.

Training

Businesses identified a need for training in the areas of safety/first aid/food safe, managerial training, customer service, and computer skills. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in local programming. Awareness of the training opportunities currently available could also be promoted within the Revelstoke business community.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 8% of respondents indicated that they have a formal succession plan and 40% have an up-to-date business plan. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses.

Economic Stability & Diversification

The location, high cost of living and population demographics (7,139 according to 2011 census) were cited most frequently by local businesses as the greatest weaknesses and its greatest barrier to growth. While there is some support for local procurement, with 22% (23 businesses) indicating they purchase a majority of their supplies from local sources, increasing the support for existing businesses could improve business stability and address the challenges that a small population base and remote location create. Actions could also include supporting businesses to expand to virtual markets, and understanding what supplies are needed locally and finding ways of providing those supplies locally. Respondents indicated that technology based businesses and tourism related businesses could be attracted to the region. Actions to increase the tourism industry could include continued collaboration between government and local tourism agencies such as Destination British Columbia, Tourism Revelstoke, the Revelstoke Chamber of Commerce, and local businesses. Increasing the technology sectors representation could involve working with the Kootenay Association for Science and Technology (KAST) to understand how Revelstoke can expand this sector. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

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PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey¹ conducted in the City of Revelstoke and area during 2015.

The BRE survey was initiated by the Revelstoke Community Economic Development Department in partnership with Community Futures Revelstoke and the Revelstoke Chamber of Commerce. The three agencies are co-located in the Revelstoke Visitor and Business Information Centre and work together to promote economic development in the community and to provide services to the local business community. The BRE survey was undertaken as part of the regular services that the agencies provide to local businesses. The agencies will work collaboratively to help implement the recommendations identified in the BRE survey.

The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

THE BRE CONCEPT

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

PROJECT OBJECTIVES

Objectives specific to the Revelstoke BRE project were as follows:

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

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

RESEARCH CONSIDERATIONS

THE BRE SURVEY

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data presented in this report 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.

THE DATA SET

The companies that participated in the interviews were identified from the list of business licenses generated by the City of Revelstoke. Businesses were located within the City of Revelstoke or just outside city limits. Every attempt was made to interview a representative number of businesses in each sector of the local economy, e.g. tourism, retail, manufacturing, forestry, service, etc. The businesses were contacted directly by the researchers employed to undertake the interviews and data collection. A total of 135 businesses participated in the survey.

DATA COLLECTION

A co-op student was hired from the University of British Columbia-Okanagan business program to undertake the interviews with local companies and to enter the data gathered from the interviews into the ExecutivePulse database. Interviews and data input took place from January to August of 2015. Toward the end of the project, a local consultant was hired to complete the interviews and data input.

On average, the interview process took approximately 90 minutes to two hours to complete, and the data entry required an additional hour per interview. The persons interviewed were either the owners of the businesses or a senior manager in the company.

DATA INPUT, ANALYSIS AND REPORTING

The people carrying out the interviews were responsible for entering the data into the ExecutivePulse system. The interviewers ensured that all information was maintained in a confidential manner prior to entry into the database. The RDI was responsible for confidentiality of the information after entry into the database.

Quantitative data were analysed using descriptive statistics and qualitative data were analysed using the grounded theory method of generating key coding themes. Based on the results of data analysis activities, an initial draft was generated by RDI and then reviewed with the Revelstoke Project Team: Alan Mason, Director of Community Economic Development, Judy Goodman, Executive Director of the Revelstoke Chamber of Commerce, and Kevin Dorrius, General Manager

of Community Futures Revelstoke. Findings and related recommendations were assembled into this report by RDI researchers.

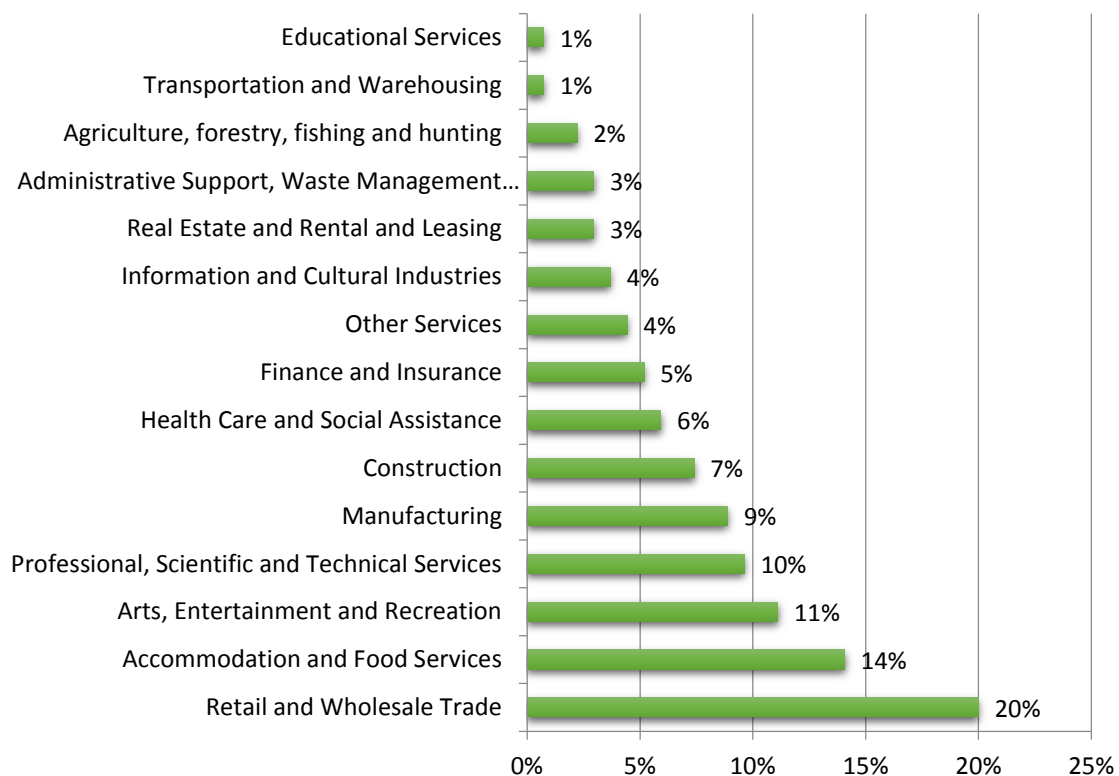
RESEARCH FINDINGS²

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed most commonly represent the commercial and tourism related sectors. Most common are Retail and Wholesale Trade (20% or 27 respondents), Accommodation and Food Services (14% or 19 respondents) and the Arts, Entertainment and Recreation sector (11% or 15 respondents).

Figure 1: Industry classification



Note: 135 respondents

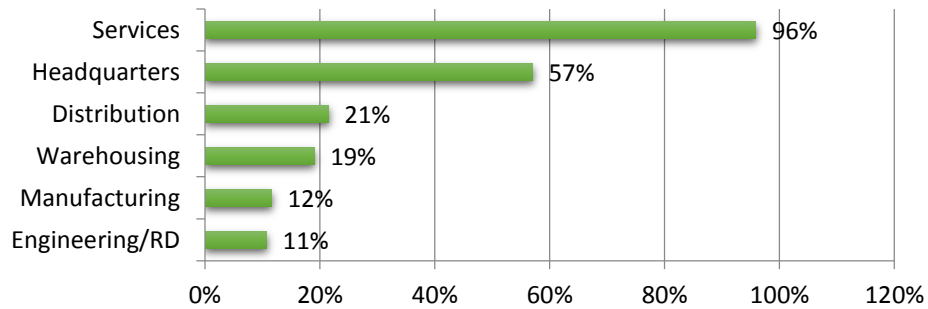
Facility Function

The majority of respondents (96% or 116 respondents) indicated that their facility provides services, with 57% or 69 respondents indicating that their facility serves as a the headquarters. Other facility uses include distribution (21% or 26 respondents) and warehousing (19% or 23

² In many instances respondents provided multiple answers, resulting in responses which exceed the number of respondents. Consequently, percentages can exceed 100%. See, for example, Figure 2.

respondents). nearly matching that is the indication that services are also provided (29% or 57 respondents). Fewer respondents indicated that their facility serves as manufacturing or engineering/R&D purposes.

Figure 2: Facility function(s)

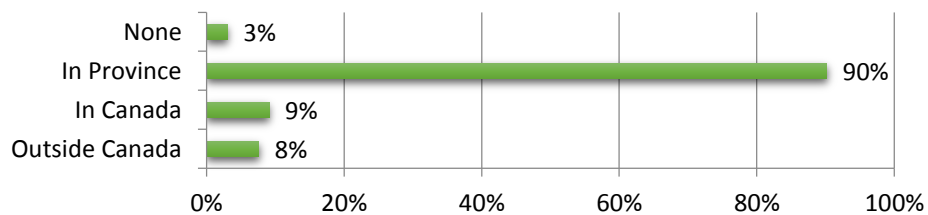


Note: 121 respondents

Competition

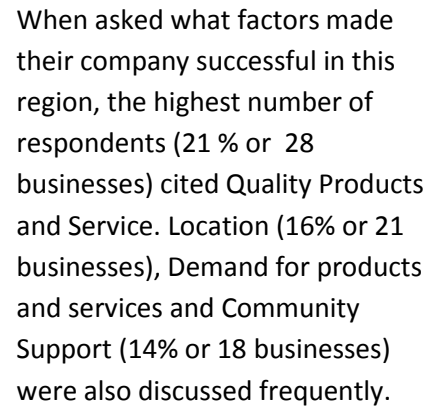
The vast majority of competition (90 % or 119 responses) reported was coming from the within the province.

Figure 3: Location of primary competitors



Note: 132 respondents

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



"Revelstoke is a destination for snowmobiling, ATVing, Dirt-biking and other adventure sports."

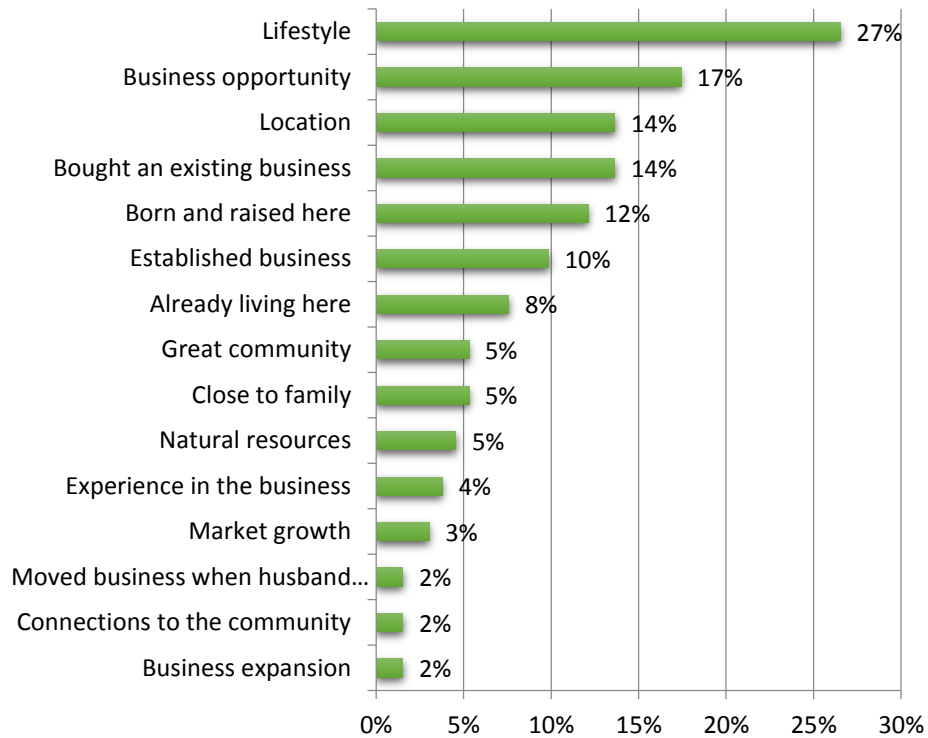
"...product that is in high demand and fits many needs."

"...winter and summer tourism - 2 very strong seasons."

"One is the great community support in Revelstoke. Support the local community so they support back, sponsoring local events, and charities."

Lifestyle (27% or 35 respondents) was the most frequently cited reasons given for businesses to locate in Revelstoke. 'Business opportunities' was also frequently cited (17% or 23 respondents). The location and the purchase of an existing business were reasons given by 14% or 18 respondents.

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

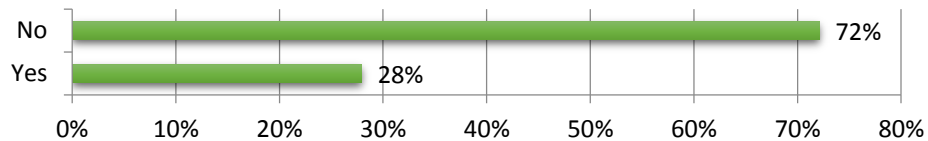


Note: 132 respondents

Other Locations

72% of respondents (93 respondents) indicated that they do *not* have any other locations.

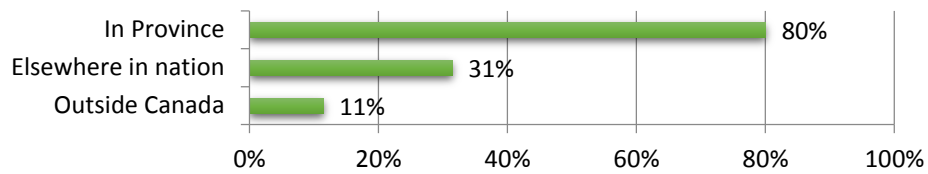
Figure 6: Other Locations



Note: 129 respondents

80% of those respondents with other locations (28 respondents) are in other areas of the province, 31% (11 respondents) are in other parts of Canada and 11% (4 respondents) indicated that their company has another location outside of Canada.

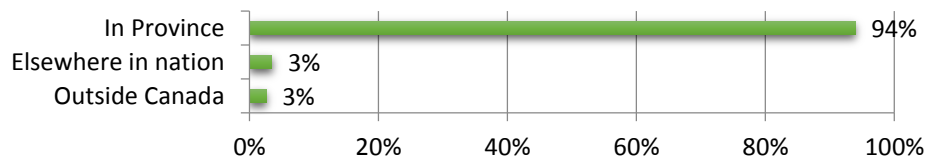
Figure 7: Location of Other Locations



Note: 35 respondents

94% (108 businesses) of respondents reported that their headquarters are located in British Columbia, and only 3% (4 business) indicated that their headquarters are located outside of BC (4 businesses) or outside of Canada (3 businesses).

Figure 8: Location of headquarters

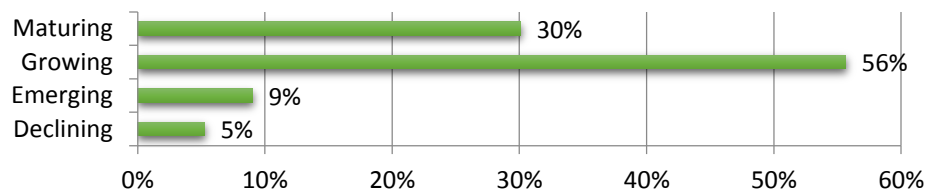


Note: 115 respondents

Age and Life Cycle Stage

Over half of respondents (56% or 74 respondents) reported that their business is in the 'growing' life cycle stage. Another 30% (40 businesses) indicated that their business is in the 'maturing' stage. Only 9% (12 businesses) indicated that they were in the 'emerging', and only 5% (7 businesses) indicated they were 'declining'.

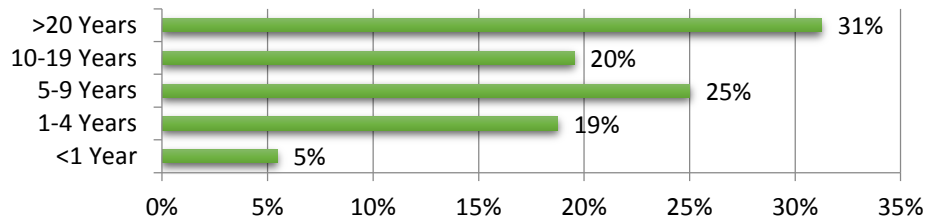
Figure 9: Life cycle stage



Note: 133 respondents

Most businesses (31% or 40 respondents) reported that they have been in business for more than 20 years. 25% of businesses have been in business from between or from between 10 – 19 years (32 respondents).

Figure 10: Length of time in business

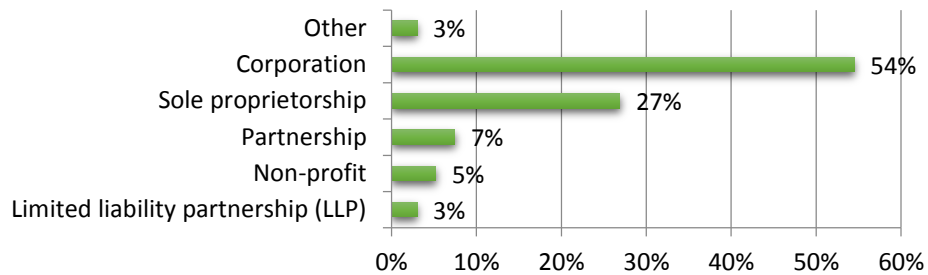


Note: 128 respondents

Ownership and Management

The vast majority of businesses are privately owned (92% or 120 respondents). Most respondents (54% or 73 respondents) indicated that their business is classified as a corporation, while 27% (36 respondents) indicated that they are a sole proprietorship. The third most common type of business ownership is a partnership (7% or 10 respondents). The remainder of businesses are registered as a non-profit (7 respondents), other type of business (4 respondents), or limited liability partnership (4 respondent).

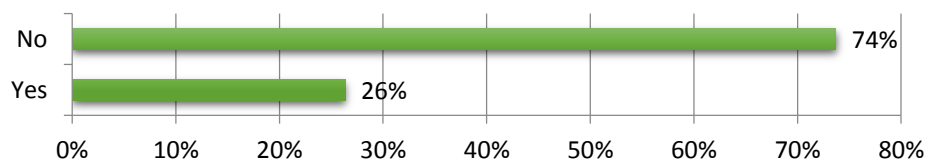
Figure 11: Type of business



Note: 134 respondents

74% of businesses (98 businesses) have not seen a management or ownership change in the last 5 years, while just 26% of businesses (35 businesses) have changed management and/or ownership over that same period of time. Only 16 businesses (13%) are expecting an ownership change in the near future. Of the 35 respondents that have seen changes in management and or ownership, 79% (26 businesses) report that change has had a positive impact.

Figure 12: Ownership and management changes in last 5 years

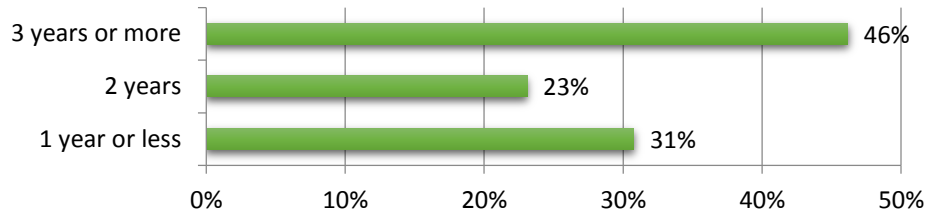


Note: 133 respondents

Succession and Business Plans

Of the 16 businesses that responded and reported a pending ownership change, 4 (31%) expect the change will happen within one year, 3 (23%) expect the change to occur in two years, and 6 (46%) expects the process to take 3 years or more.

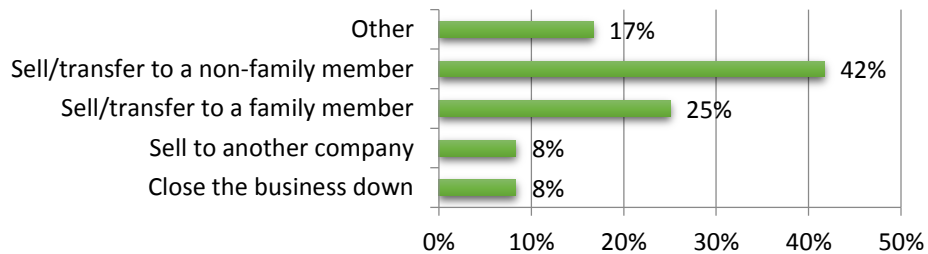
Figure 13: Anticipated timeline for ownership change



Note: 13 respondents

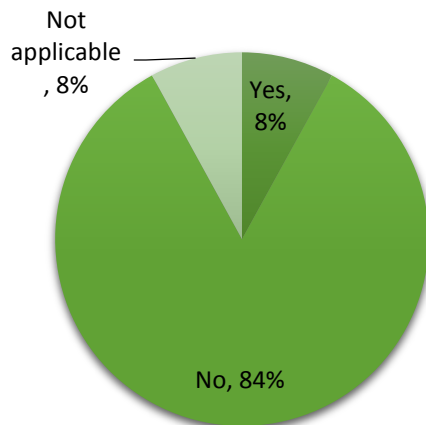
42% of respondents (5 respondents) expect that the current owner will exit the business by selling it to a non-family member, while 25% (3 respondents) expect it to be sold/transferred to a family member company.

Figure 14: Anticipated exit strategy



Note: 12 respondents

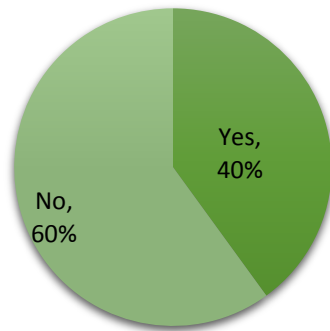
Figure 15: Existence of formal succession plan



Only 8 % (10 respondents) indicate that they have identified a successor and have a formal succession plan in place. 67% (4 respondents) of those with a succession plan indicated that they had assistance in its' preparation. Assistance came from a variety of sources: lawyers, bankers and accountants.

Note: 125 respondents

Figure 16: Existence of current business plan



Over half of all respondents (60% or 81 respondents) indicated that they do *not* have a business plan in place.

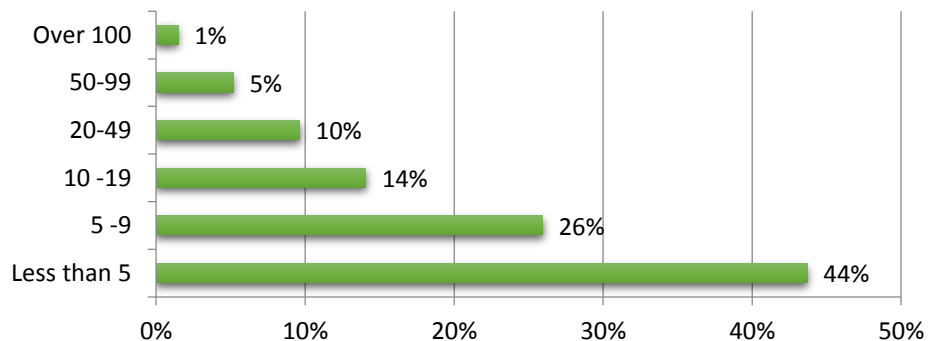
Note: 135 respondents

LOCAL WORKFORCE

Size of Workforce

The 135 businesses interviewed reported a total of 2,081 employees. 44 % or 59 of the businesses surveyed indicated that they have less than five employees, and 26 % (35 businesses) have between 5 and 9 employees. There are a number of moderately sized employers, with 14% (19 businesses) reporting between 10 – 19 employees, and 10% (13 businesses) reporting between 20 – 49 employees.

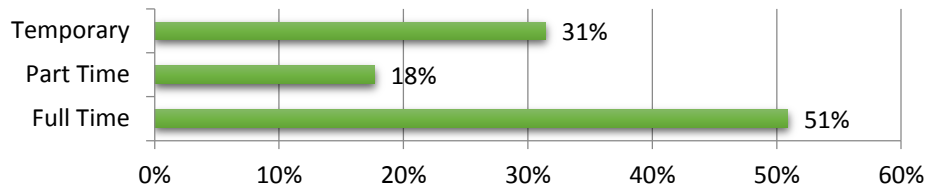
Figure 17: Total number of employees



Note: 135 respondents

51% (1,059) of employment positions at surveyed businesses are full time, 31% (654) are temporary and 18% (368) are part time.

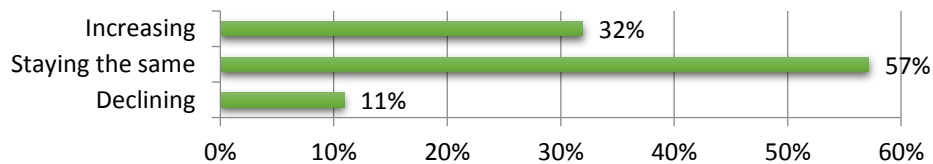
Figure 18: Nature of employment



Note: 135 respondents

57% of respondents (68 businesses) indicated that the number of employees at their business has stayed the same over the last three years. While 32% (38 businesses) indicated that the size of their workforce has increased. Only 11% (13 businesses) indicated a decrease.

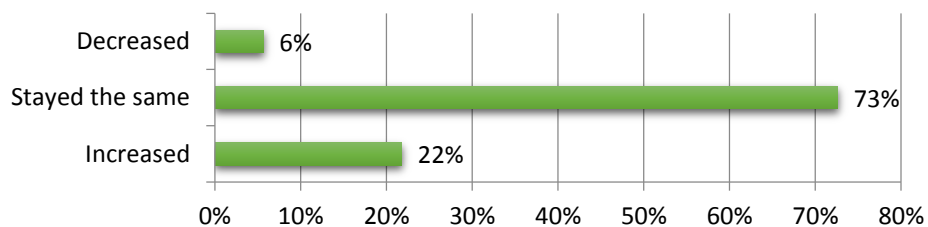
Figure 19: Historical Employment trend over last 3 years



Note: 119 respondents

The last three years has seen the size of the full-time workforce remain stable, with 73% of businesses (90 respondents) reporting that the number of full time employees has remained constant.

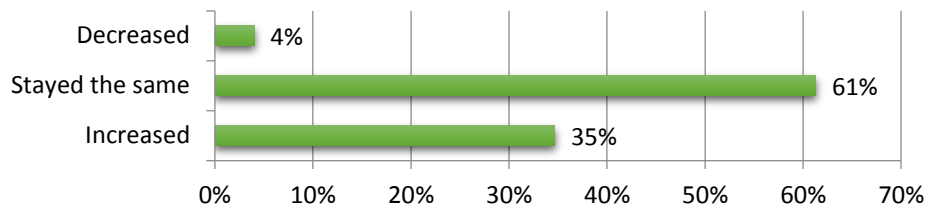
Figure 20: Full-time employment trend over last 3 years



Note: 124 respondents

61% of businesses (76 respondents) interviewed expect the size of their full-time workforce will stay the same over the next 3 years, while 35% (43 respondents) expect it to increase. Just 4% (5 respondents) expect a decrease over the next 3 years.

Figure 21: Full time employment trend over next 3 years

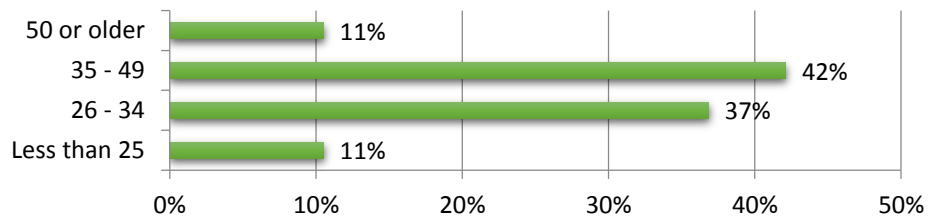


Note: 124 respondents

Workforce Demographics

Of the responses received, 42% (48 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 37% (42 respondents) of businesses indicated that the majority of their employees were between 26 and 34 years old.

Figure 22: Age of the majority of essential employees

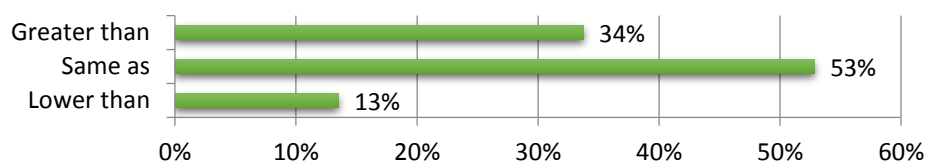


Note: 114 respondents

Wages

When reporting on average wages for skilled or professional workers, the most common response (37% or 26 businesses) indicated they pay between \$20 and \$29.99 per hour. The most commonly reported average wage for semi-skilled workers (32% or 22 businesses) was under \$15 - \$19.99 and the most commonly reported average wage for entry-level workers (53% or 30 businesses of respondents) was \$10 - \$12.99. 53% of respondents (47 respondents) reported that their wage scale is similar to other businesses in the region.³

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



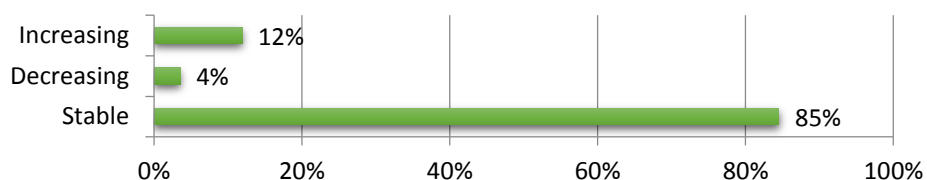
³ Detailed wage data is found in Appendix A.

Note: 89 respondents

Recruitment and Retention

Of those businesses that responded, 85% (71 respondents) indicated that the number of unfilled positions at their company remains constant.

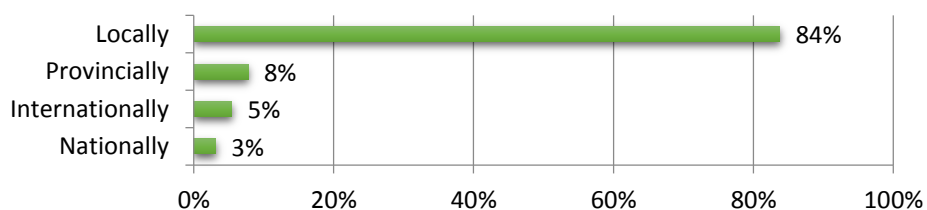
Figure 24: Trend in unfilled positions



Note: 84 respondents

The vast majority of respondents (84% or 108 respondents) reported that they primarily recruit employees locally. Just 8% (10 respondents) recruit provincially, while 5% (7 respondents) report that they recruit internationally, and 3% (4 respondents) reported recruitment within Canada.

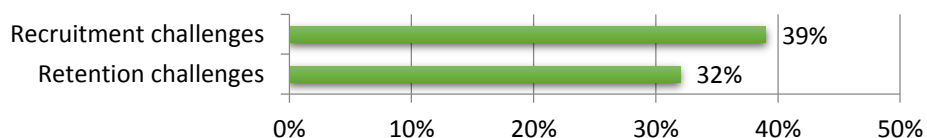
Figure 25: Location of workforce recruitment



Note: 129 respondents

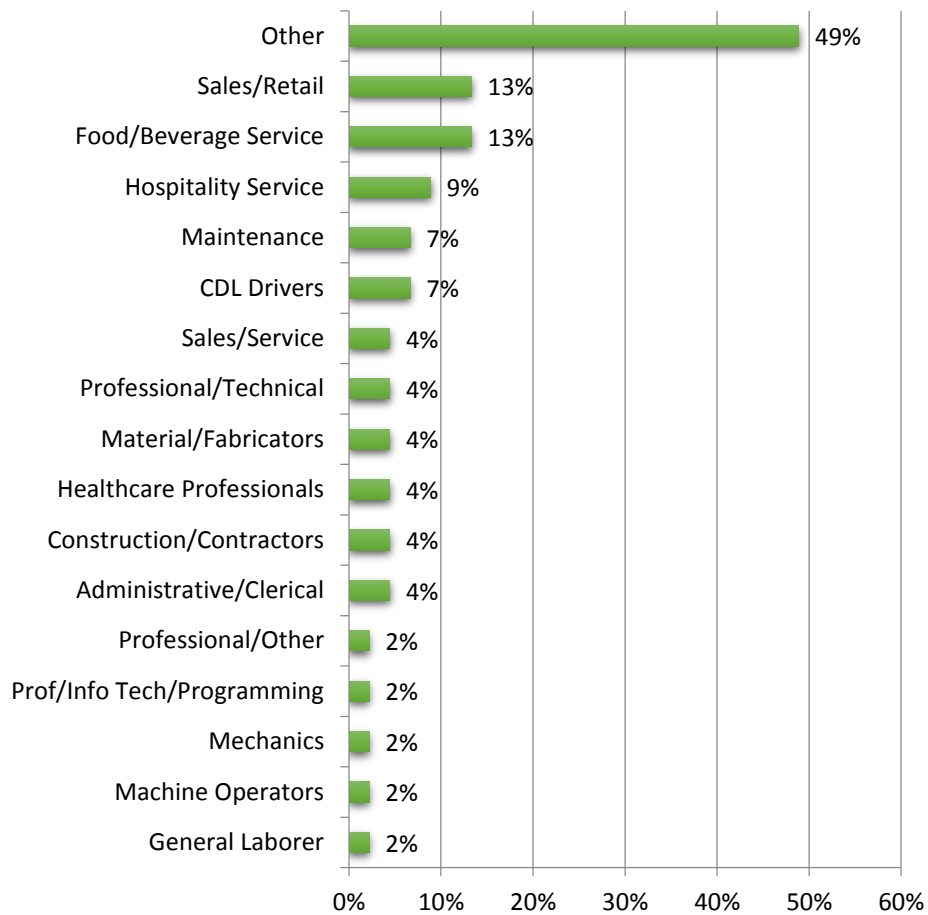
Of the respondents, 39% (48 respondents) indicated that they have experienced recruitment challenges and 32% (40 respondents) indicated that they have experienced retention challenges.

Figure 26: Recruitment and retention challenges



Of the 22 companies that indicated they were experiencing recruitment challenges, the areas currently experiencing recruitment problem include sales/retail (13% or 6 respondents), food/beverage service (13% or 6 respondents), and hospitality service (9% or 4 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

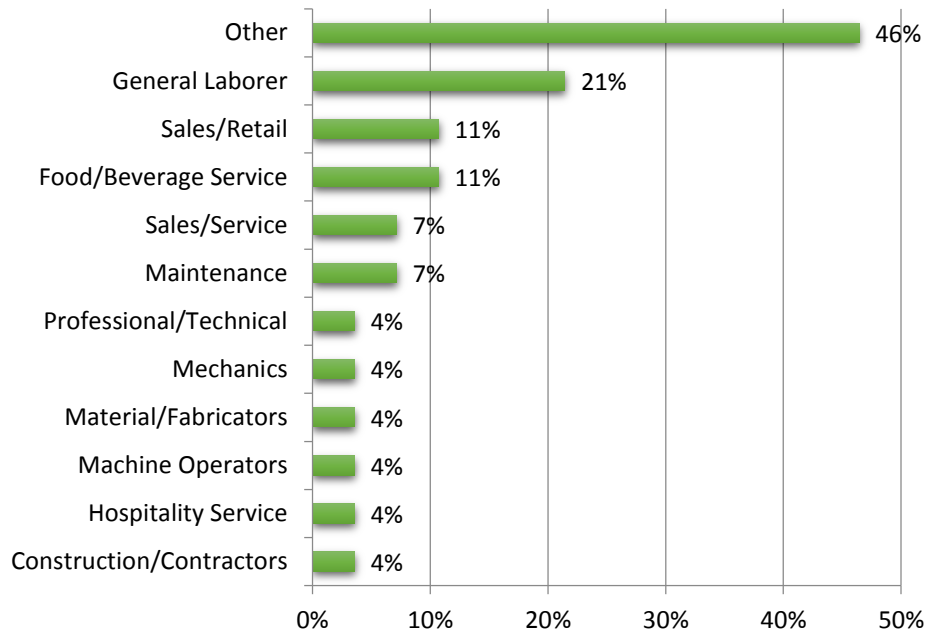
Figure 27: Current recruitment areas



Note: 45 respondents

Only 39% of respondents (47 respondents) anticipate future recruitment difficulties within the next 3 to 5 years. The most commonly anticipated recruitment areas which may prove challenging include general labour (21% or 6 respondents), sales/retail and food/beverage service (both at 11% or 3 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

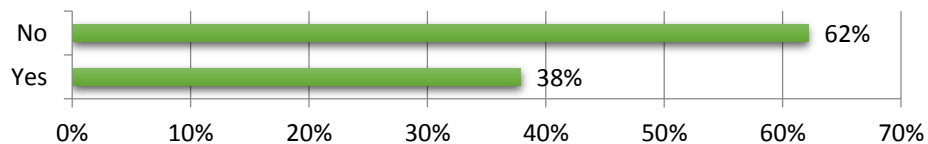
Figure 28: Future areas where recruitment may be challenging



Note: 28 respondents

Only 38% of respondents (42 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. Suggestions include reducing the cost of living (15% or 6 respondents), improved advertisement (12% or 5 respondents), affordable housing (10% or 4 respondents), and provide training support (7% or 3 respondents).

Figure 29: Strategies to overcome employee recruitment challenges

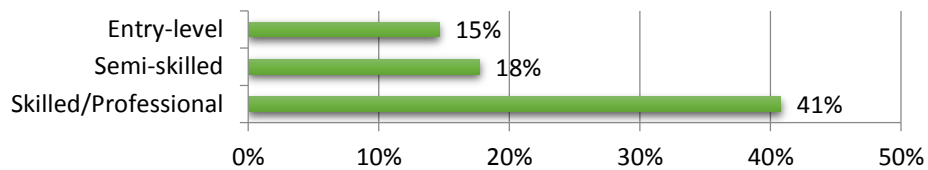


Note: 111 respondents

Skills and Training

41% of respondents (53 respondents) indicated that the majority of their workforce is comprised of skilled or professional workers, 18% (23 respondents) indicated that their workforce is mainly semi-skilled workers, while 15% (19 respondents) of workplaces are comprised of an entry-level workforce.

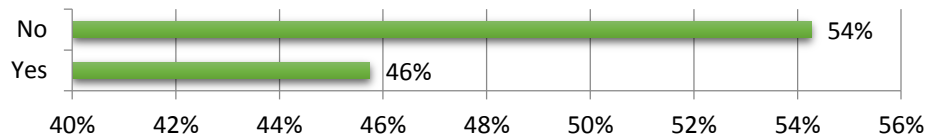
Figure 30: Skill level of majority of workforce



Note: 130 respondents

46% (59 respondents) indicated that there is a training budget to upgrade employee skills. 83% (107 businesses) indicated that their company offers in-house training and 37% (46 businesses) use contracted training.

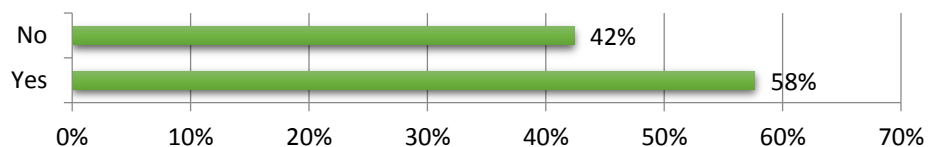
Figure 31: Training Budget



Note: 129 respondents

58% of respondents (68 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.

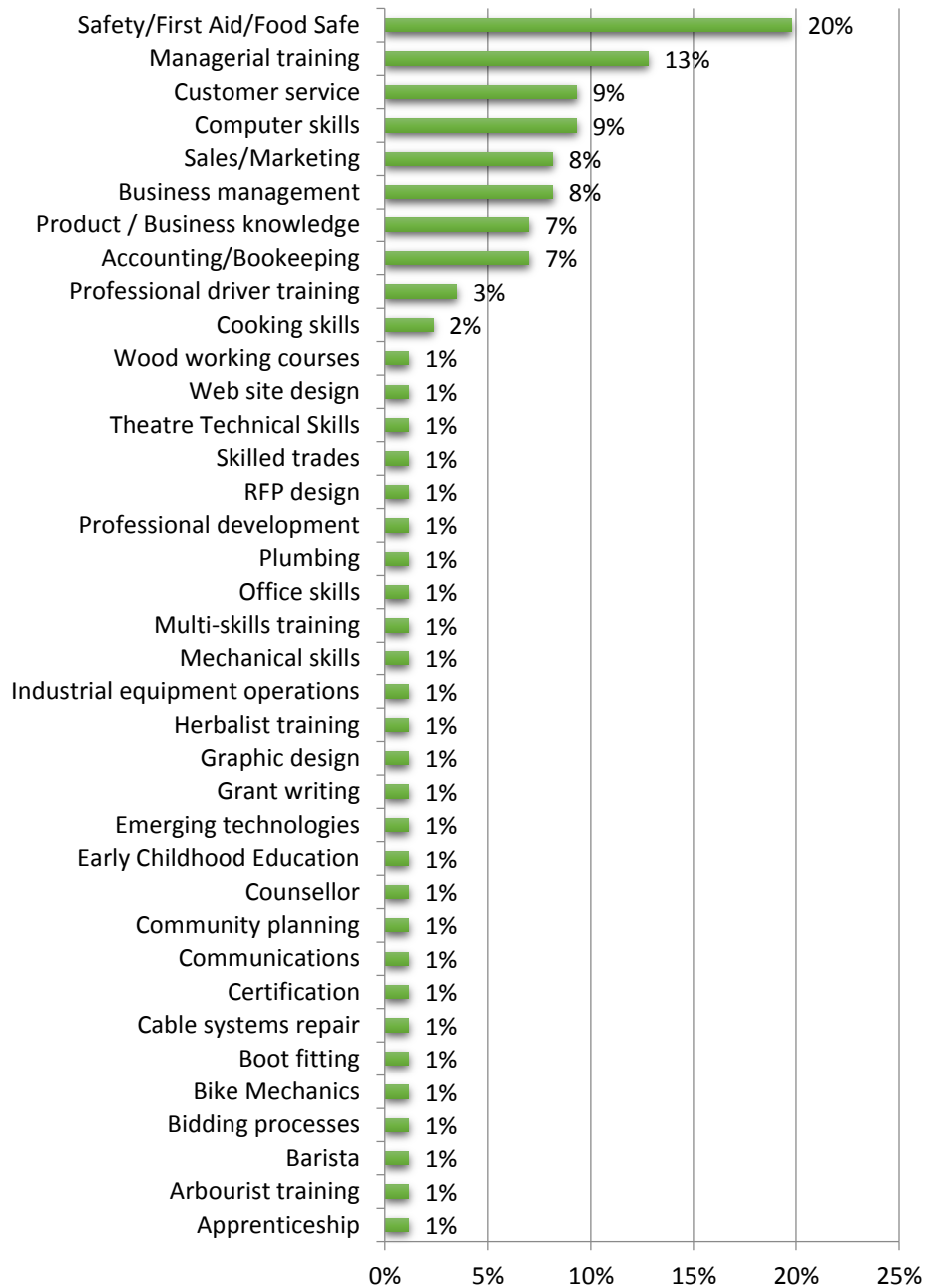
Figure 32: Anticipated trends, technologies, significant changes requiring new skills



Note: 118 respondents

72% or 88 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were safety/first aid/food safe (20% or 17 businesses), managerial training (13% or 11 businesses), and customer service (9% or 8 businesses)

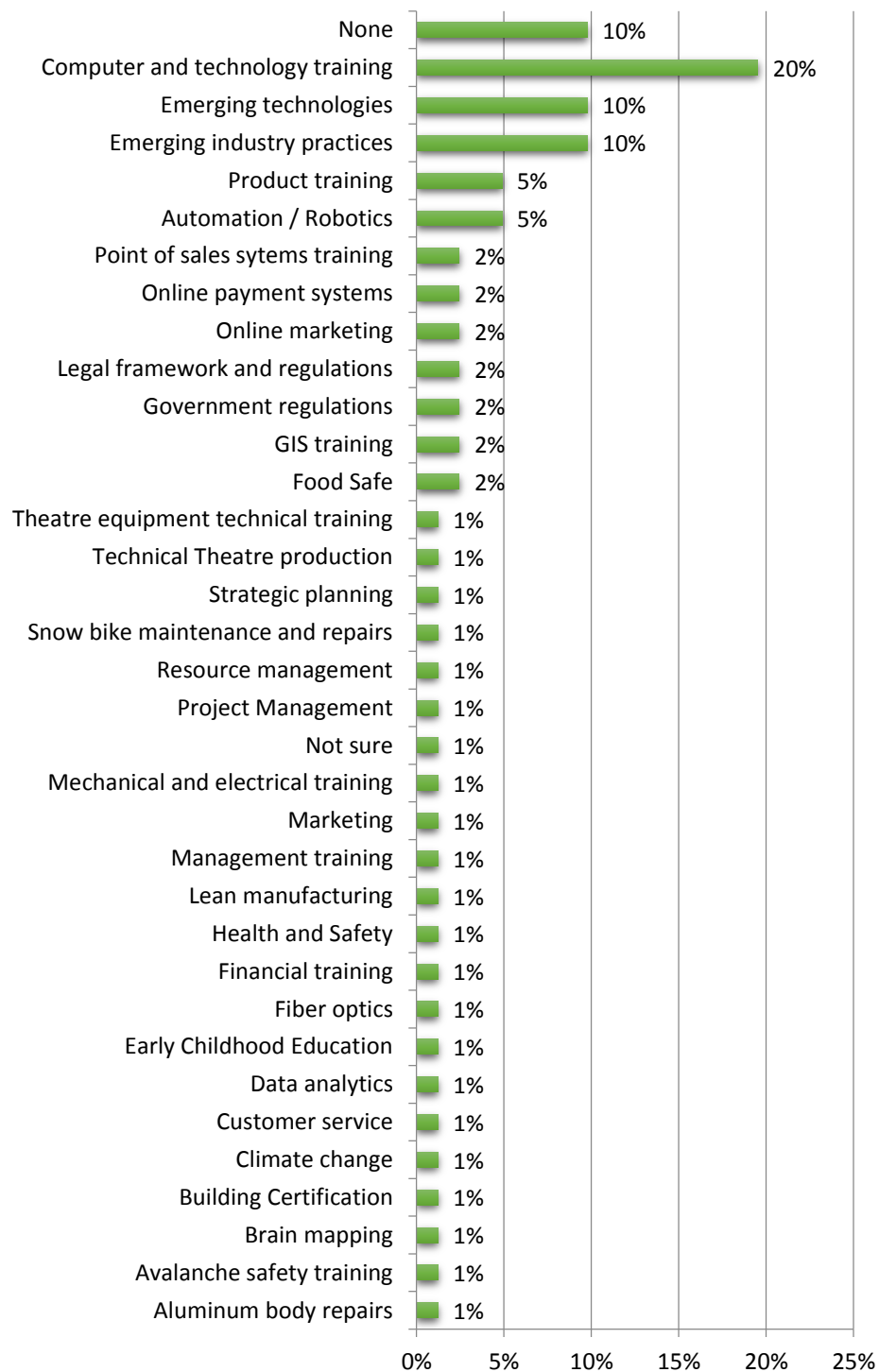
Figure 33: Training or professional development needs



Note: 86 respondents

When asked what new training might need to be considered in the next five years, the most commonly cited response was in the area of computer and technological training (20% or 16 businesses), emerging technologies (10% or 8 businesses) and emerging industry practices (10% or 8 businesses).

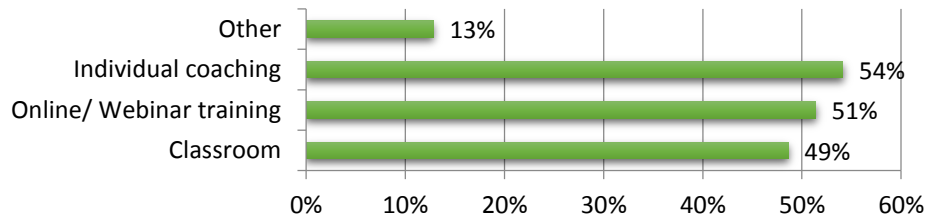
Figure 34: Areas for new Training in next five years



Note: 82 respondents

54% of respondents (59 businesses) stated that they prefer training when it is delivered through an individual coaching format, while 51% (56 businesses) preferred an online/webinar format, and 49% (53 businesses) expressed a preference for classroom training.

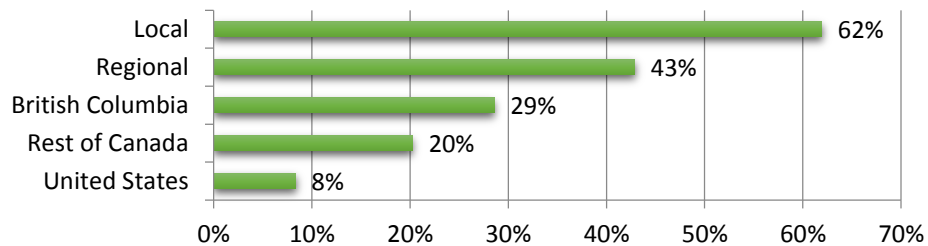
Figure 35: Preferred modes of training



Note: 109 respondents

62% of respondents (52 businesses) typically seek locally available training opportunities, and 43% (36 businesses) travel to other areas in the region for their training. 29% (24 respondents) seek training in the province. Fewer training opportunities are sought elsewhere in the country or in the United States.

Figure 36: Usual training locations



Note: 84 respondents

Unions

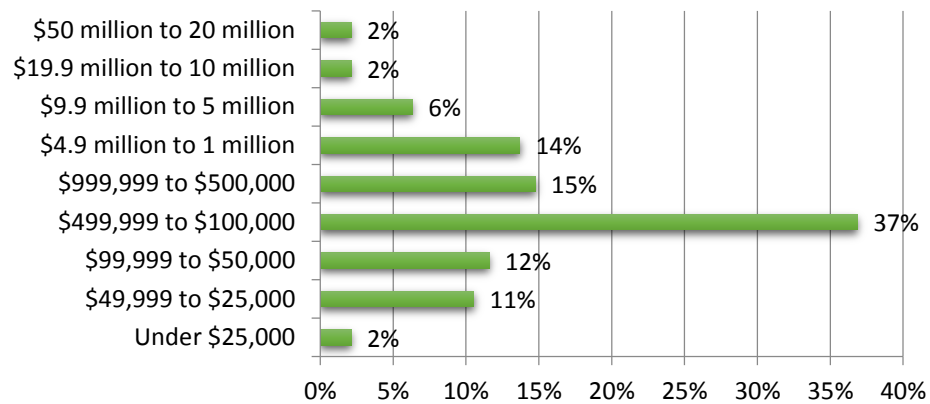
Two businesses (2%) reported that they have union status.

SALES

Market Size and Share

The highest number of respondents (35 businesses or 37%) reported annual sales between \$100,000 to \$499,000. The second highest number of respondents (14 businesses or 15%) reported annual sales between \$500,000 and \$999,999. 70% (95 businesses) of respondents chose to share annual sales information.

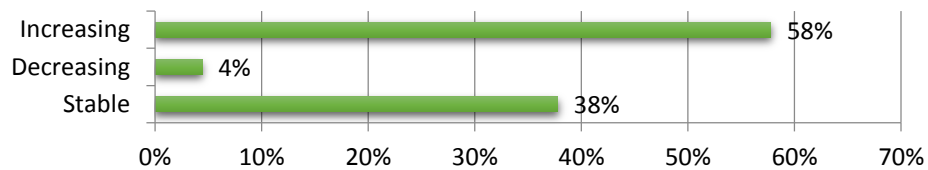
Figure 37: Annual sales



Note: 95 respondents

The majority of businesses interviewed (58% or 78 businesses) indicated that the size of the market for their product or service is increasing. Another 38% (51 businesses), reported that the market is stable.

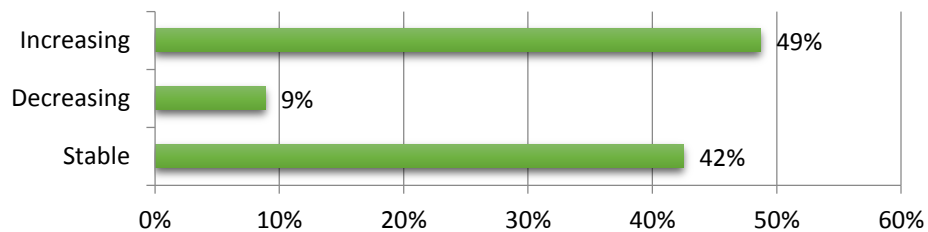
Figure 38: Status of market for product/service



Note: 135 respondents

49% (55 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 42% (48 businesses) indicated that it is stable. A small number of respondents (9% or 10 businesses) indicated that their market share is decreasing.

Figure 39: Market Share in Comparison to Competitors

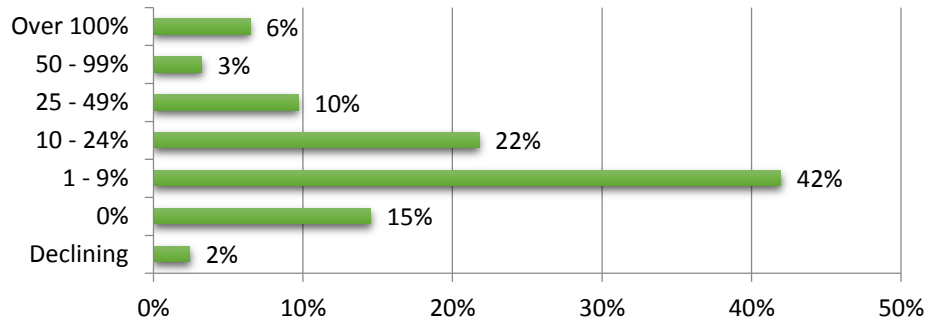


Note: 113 respondents

Growth

42% of respondents (52 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 also projected by 22% of respondents (27 businesses). 15% (18 businesses) of respondents expect their sales to remain stagnant.

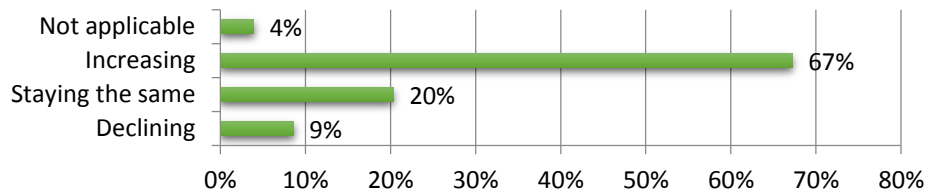
Figure 40: Projected sales growth in the next year



Note: 124 respondents

The majority of responses (67% or 86 businesses) indicated that sales at their business have increased over the past five years, 20% (26 businesses) indicated that sales have remained relatively stable and 9% (11 businesses) reported that sales have declined.

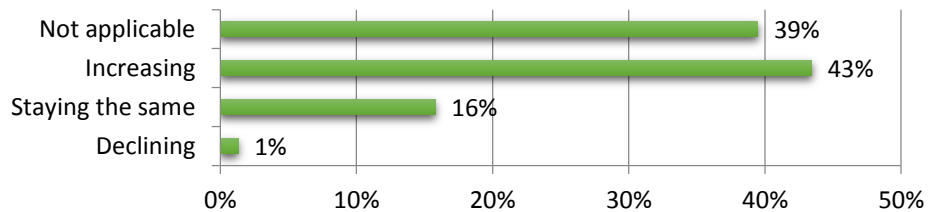
Figure 41: Historic sales trend at this location



Note: 128 respondents

Of the 46 businesses that have parent companies, the historic sales trend appears to be increasing according to 43% (33 respondents) of the businesses.

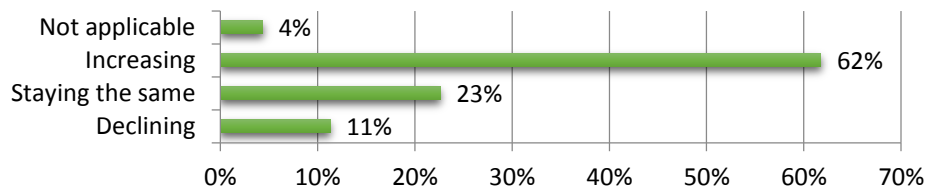
Figure 42: Historic sales trend at parent company



Note: 76 respondents

62% percent of respondents (71 businesses) reported that sales within their industry have been increasing while 23% (26 businesses) reported that they have remained stable.

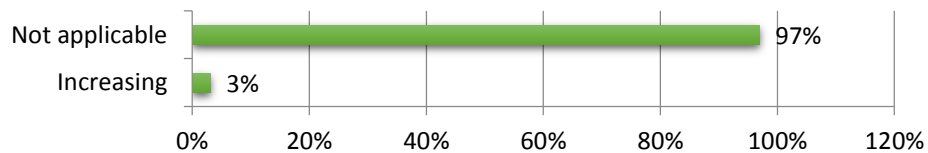
Figure 43: Historic sales trend within the industry



Note: 115 respondents

Only 3% (3 businesses) indicated that historically the sales export trend has been increasing. 97% (94 businesses) indicated that export sales trend was not applicable.

Figure 44: Historical export sales trend

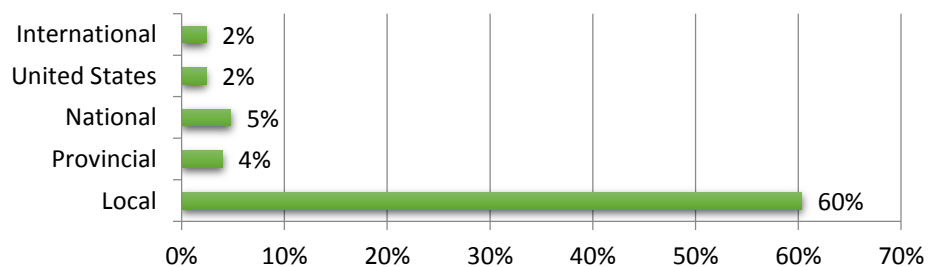


Note: 97 respondents

Source of Sales

A majority of respondents (60% or 76 respondents) indicated that over 50% of their sales are to local customers. 5% (6 respondents) indicated that over 50% of their sales are within the country. Fewer respondents (4%, 2%, 2%) indicated that the majority of their sales are within the province, to the US, or to international markets, respectively.

Figure 45: Geographic source of majority of sales

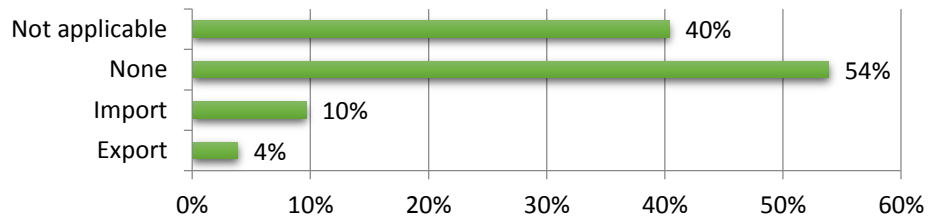


Note: 126 respondents

Just 4 respondents (4%) indicated that they export goods or services to other countries, and 10 respondents (10%) indicated they import from other countries. 40% of respondents (42 businesses)

stated that the question of international trade was not applicable, while an additional 54% (56 businesses) indicated they do not have any international trade status.

Figure 46: International trade status

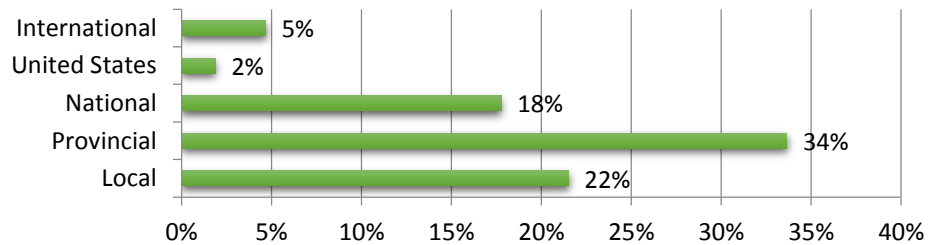


Note: 104 respondents

Procurement

34% of respondents (36 businesses) interviewed reported that they purchase a majority of their supplies from provincial sources. 22% (23 businesses) indicated that the majority of their supplies come from businesses located within the local area.

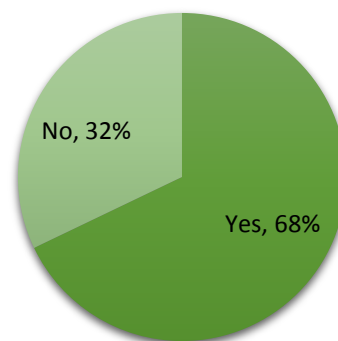
Figure 47: Geographic source of majority of supplies



Note: 107 respondents

68% (74 businesses) indicated that they supply their products or services to companies within the community/region.

Figure 48: Supplier within Community or Region

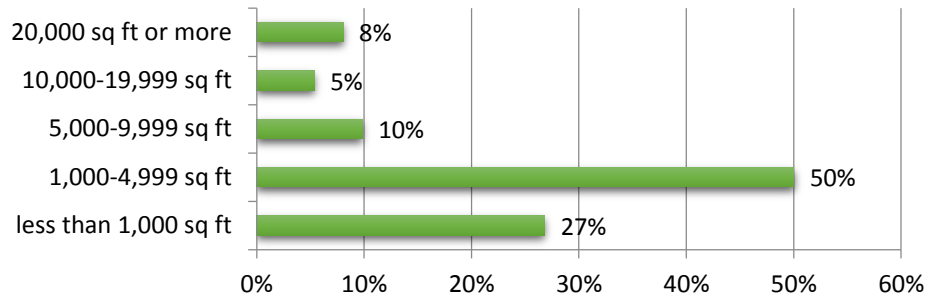


FACILITIES AND EQUIPMENT

Size and Condition

50% (56 businesses) of respondents reported that their facility is between 1,000 square feet and 4,999 square feet. Another 27% (30 businesses) indicated it was less than 1,000 feet in size.

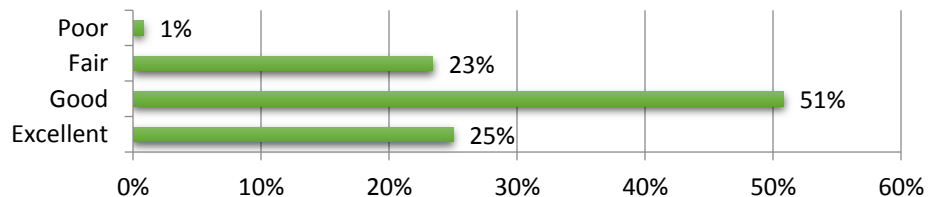
Figure 49: Size of facility



Note: 112 respondents

51% of respondents (63 businesses) indicated that their facility is in good condition. Another 25% (31 businesses) indicated that it is in excellent condition and 23% (29 businesses) reported that their facility is in fair condition. Only 1% (1 business) reported that their facility was in poor condition.

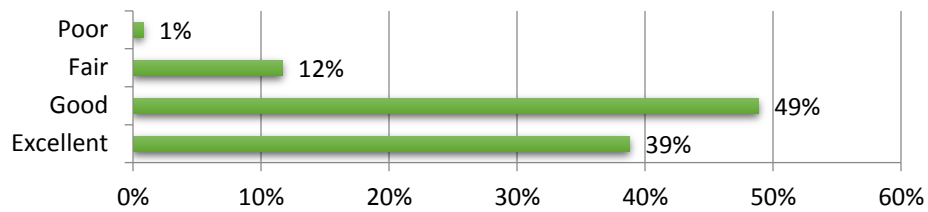
Figure 50: Condition of facility



Note: 124 respondents

49% (63 businesses) of respondents indicated that their equipment is in good condition. 39% (50 businesses) indicated that it is in excellent condition and 12% (15 businesses) report their equipment is in fair condition.

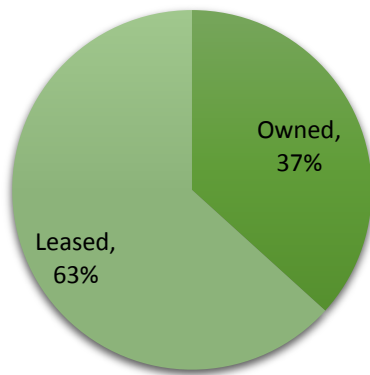
Figure 51: Condition of equipment



Note: 129 respondents

Ownership

Figure 52: Ownership status of facility

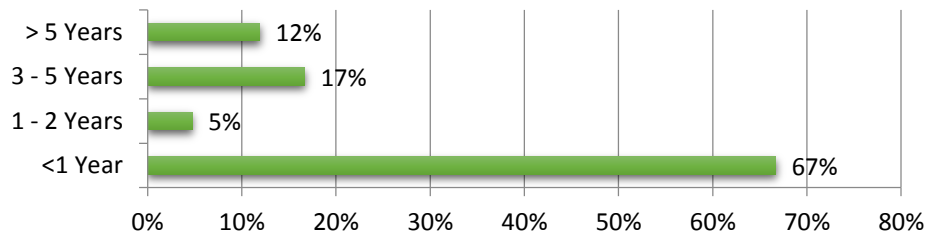


63% of respondents (81 businesses) lease the facility in which they operate and 37% (47 businesses) own it.

Note: 128 respondents

Of the 81 businesses that lease their facility, 42 provided a response to the amount of time remaining on the lease. 67% (28 businesses) have less than a year remaining on their lease and 17% (7 businesses) have between three and five years remaining.

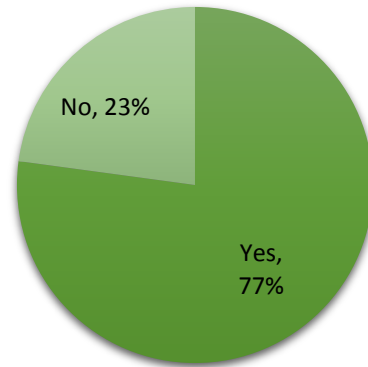
Figure 53: Length of time remaining on lease



Note: 42 respondents

Figure 54: Intending on renewing current lease?

The majority of respondents that lease their facility (77% or 54 businesses) intend to renew their current lease agreement. Of those who are not intending to renew their current lease, the reasons include moving to a new location (33% or 4 businesses) and purchasing a new facility (25% or 3 businesses).

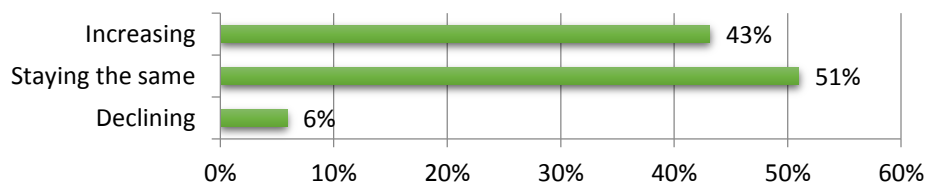


Note: 70 respondents

Investment and Expansion

51% of respondents (52 businesses) indicated that their company's investment in their facility has stayed the same over the past 18 months, while 43% (44 businesses) indicated that the investment has increased. Only six businesses (6%) indicated that investment in their facility has decreased over the same time period.

Figure 55: Historical Investment in facility (past 18 months)



Note: 102 respondents

68% of respondents (82 businesses) indicated that there are no expansion plans within the next 12 – 18 months.

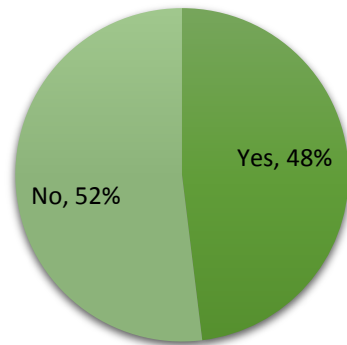


Figure 56: Plans to expand within three years

48% of respondents (62 businesses) plan to expand within three years, while 52% (67 businesses) do not.

Note: 129 respondents

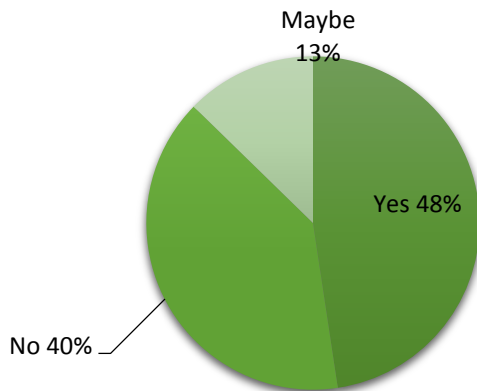


Figure 57: Room for expansion

48% (62 businesses) indicated that there *was* room for expansion at their site, while 40% (50 businesses) indicated that there *was not* room at their current site.

Note: 126 respondents

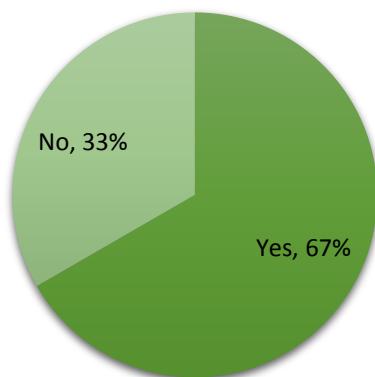


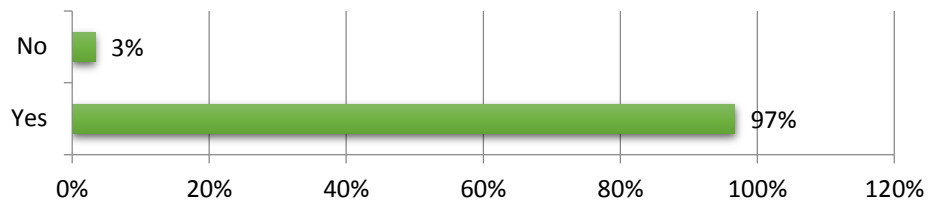
Figure 58: Adequacy of current site to support expansion

Of the 62 businesses planning expansion in the next three years, 67% (40 businesses) reported that their current site will be adequate.

Note: 60 respondents

The vast majority of respondents (97% or 58 businesses) planning to expand indicated that expansion will occur within the community.

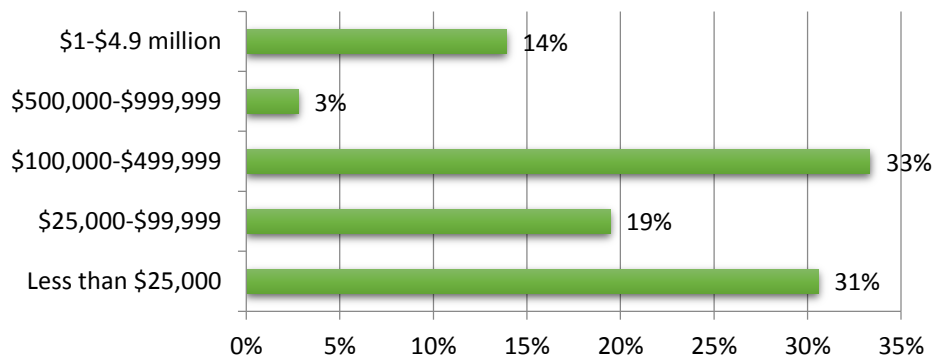
Figure 59: Expansion to occur in community



Note: 60 respondents

A substantial investment is planned for 5 businesses (14%), with investment over \$1 million planned, while one additional business is planning investments in the range of \$500,000 - \$999,999. The majority of investment reported by businesses will be more modest in the range of \$100,000 - \$499,999 (33% or 12 businesses), \$25,000 - \$99,999 (19% or 7 businesses), and less than \$25,000 (31% or 11 businesses).

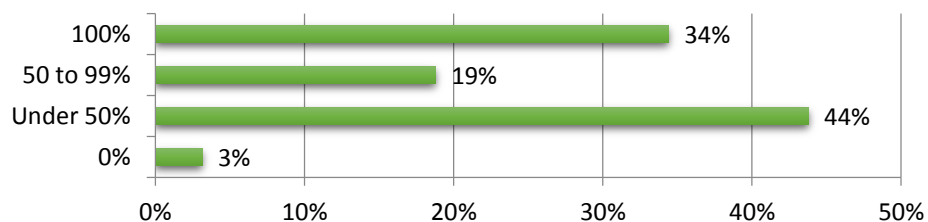
Figure 60: Estimated expansion investment



Note: 36 respondents

Of the 62 businesses planning expansion, 44% (14 respondents) anticipate devoting under 50% of their budget to equipment and technology, while 34% (11 respondents) indicated they anticipate devoting their entire budget.

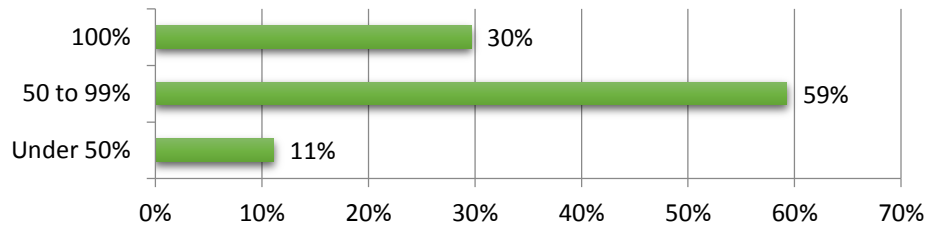
Figure 61: Component of expansion budget for equipment and technology



Note: 32 respondents

Of the 62 businesses planning to expand in the three years, 59% (16 businesses) anticipate investing 50% – 99% in real estate. 30% (8 businesses) anticipate spending 100% on real estate.

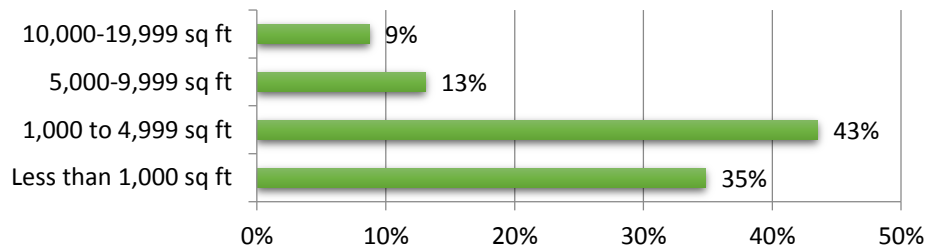
Figure 62: Component of expansion budget for real estate



Note: 27 respondents

The majority of respondents (43% or 10 respondents) indicated that they expect the size of their facility expansion will be between 1,000 and 4,999 square feet. While 8 reported (35%) their expansion would be less than 1,000 sq.ft

Figure 63: Size of facility expansion

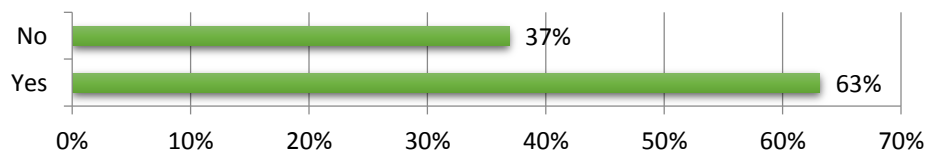


Note: 23 respondents

Facility Upgrades

63% of businesses (77 businesses) indicated that there had been recent facility upgrades. Of those 77 businesses (25%) indicated that those upgrades were completed in the last six months.

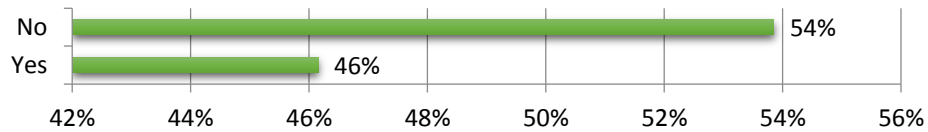
Figure 64: Recent facility upgrades



Note: 76 respondents

54% (63 businesses) indicated that they are *not* planning facility upgrades. The majority (58% or 30 businesses) of those planning upgrades indicate they will occur in the next 6 months. Respondents were also asked to identify any barriers to upgrading, five respondents (24%) indicated that financing was a barrier to facility upgrades.

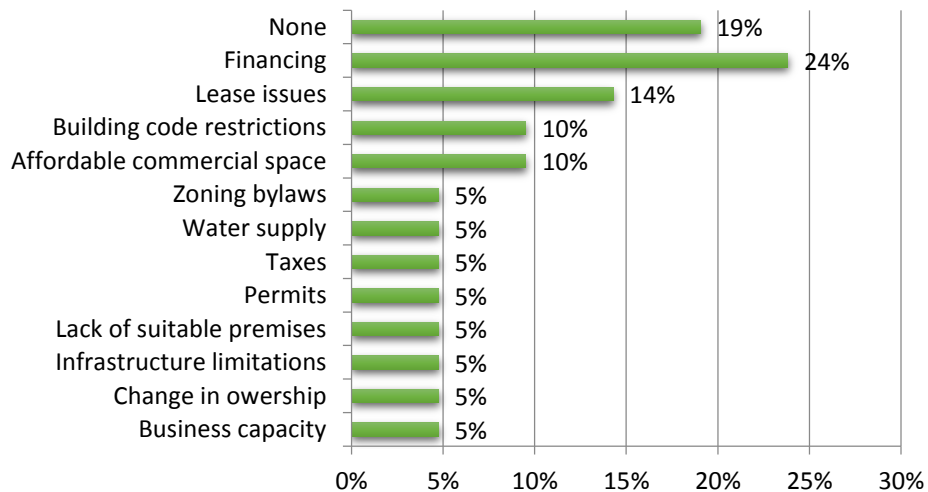
Figure 65: Planning facility upgrades



Note: 117 respondents

Respondents cited a variety of barriers to expansion; most commonly cited was financial (24% or 5 businesses), lease issues (14% or 3 businesses), building code restrictions (10% or 2 businesses), and affordable commercial space (10% or 2 businesses).

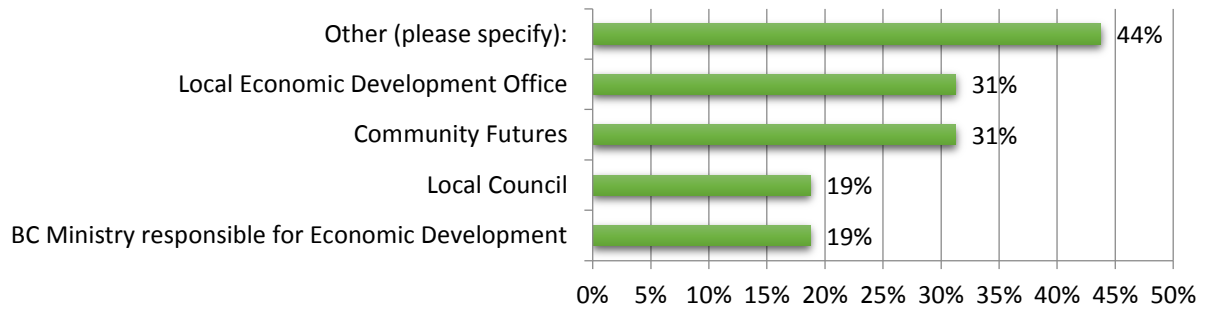
Figure 66: Barriers to expansion



Note: 21 respondents

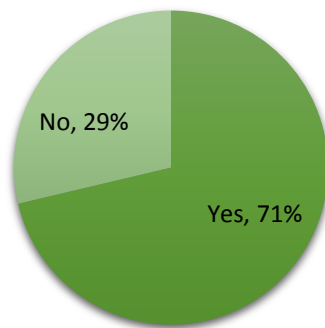
34% of respondents (26 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest number (31% or 5 businesses) had approached the Local Economic Development Office, and 31% (5 businesses) had approached Community Futures. The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 67: Organizations approached for expansion assistance



Note: 16 respondents

Figure 68: Awareness of BC Hydro Power Smart



71% of respondents (77 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

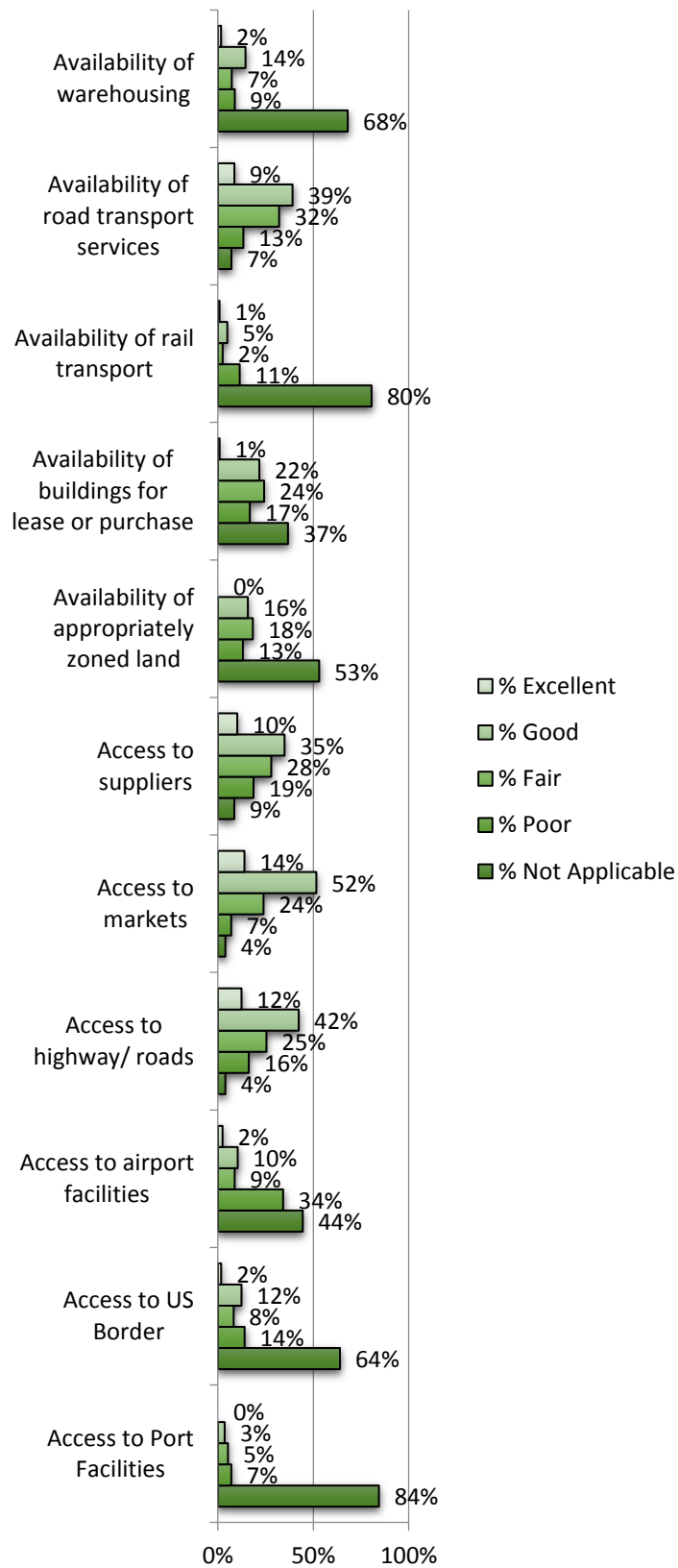
Note: 108 respondents

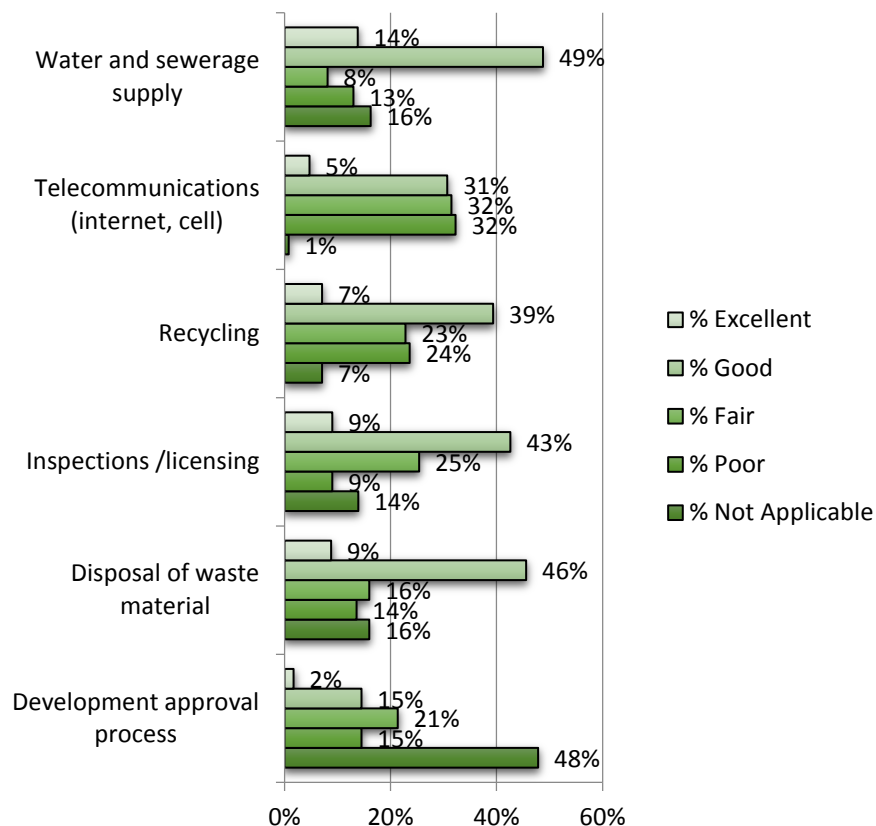
GOVERNMENT SERVICES

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 (34% or 43 businesses), telecommunications (32% or 41 businesses), and recycling (24% or 30 businesses).
- The services that received the highest number of **FAIR** ratings were telecommunications (32% or 40 businesses), availability of road transport services (32% or 41 businesses), and access to suppliers (28% or 36 businesses).
- The services that received the highest number of **GOOD** ratings were access to markets (52% or 67 businesses), water and sewerage supply (49% or 60 businesses) and disposal of waste materials (46% or 57 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to markets (14% or 18 businesses), water and sewerage supply (14% or 17 businesses) and access to highways/roads (12% or 16 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (84% or 97 businesses), availability of rail transport (80% or 99 businesses) and the availability of warehousing (68% or 85 businesses).

Figure 69: Rating of government services





Note: number of respondents varies per question

46 respondents also provided additional ratings for other services; these responses can be found in Appendix A.

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 76% respondents (97 businesses) indicated they had suggestions. The highest number of responses (32% or 31 businesses) discussed improvements to highways, road quality and service. Improvements to communication services (cell phone, internet, broadband/fiber) were also mentioned by 25% (24 businesses) of respondents. Improvements to recycling and waste management was referenced by 19% of respondents (18 businesses).

[illegible]

“Quality of Transcanada highway affects tourists ability/ willingness to travel to Revelstoke. Maintenance and upkeep of highway needs to be addressed.”

*"Access to information and
ations improved."*

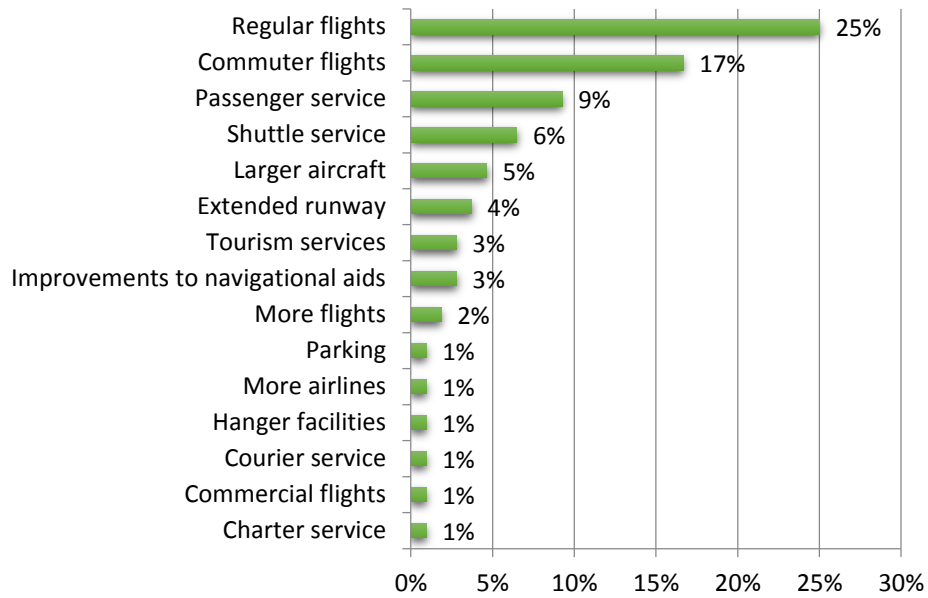
The Kelowna International Airport is the most used airport, with 90% of respondents indicating (112 businesses) indicating they use that airport. The Calgary International Airport was the second most used with 40% (50 businesses).

A horizontal bar chart titled 'Where do you live?' showing the percentage of respondents for each city. The x-axis represents the percentage from 0% to 100% in 20% increments. The y-axis lists the cities. The bars are green. The data is as follows:

City	Percentage
Kelowna	90%
Calgary	40%
Vancouver	8%
Kamloops	7%
Springbank	1%
Seattle	1%
Revelstoke	1%
Castlegar	1%
Bellingham	1%

Respondents indicated that they would most like to see more regular flights (25% or 27 businesses) and commuter flights (17% or 18 businesses). Other responses included passenger service (9% or 10 businesses), shuttle service (6% or 7 businesses), and larger aircraft (5% or 5 businesses).

Figure 72: New services at local airport



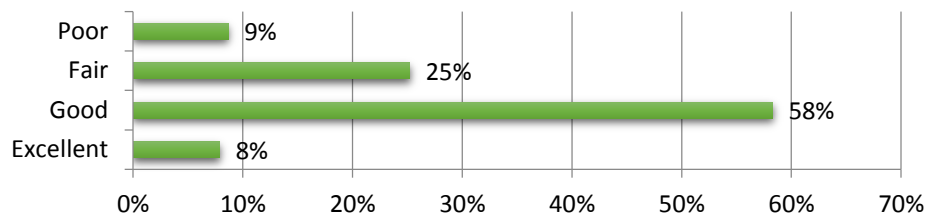
Note: 108 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as good (58% or 74 businesses).

Figure 73: Rating of local business climate



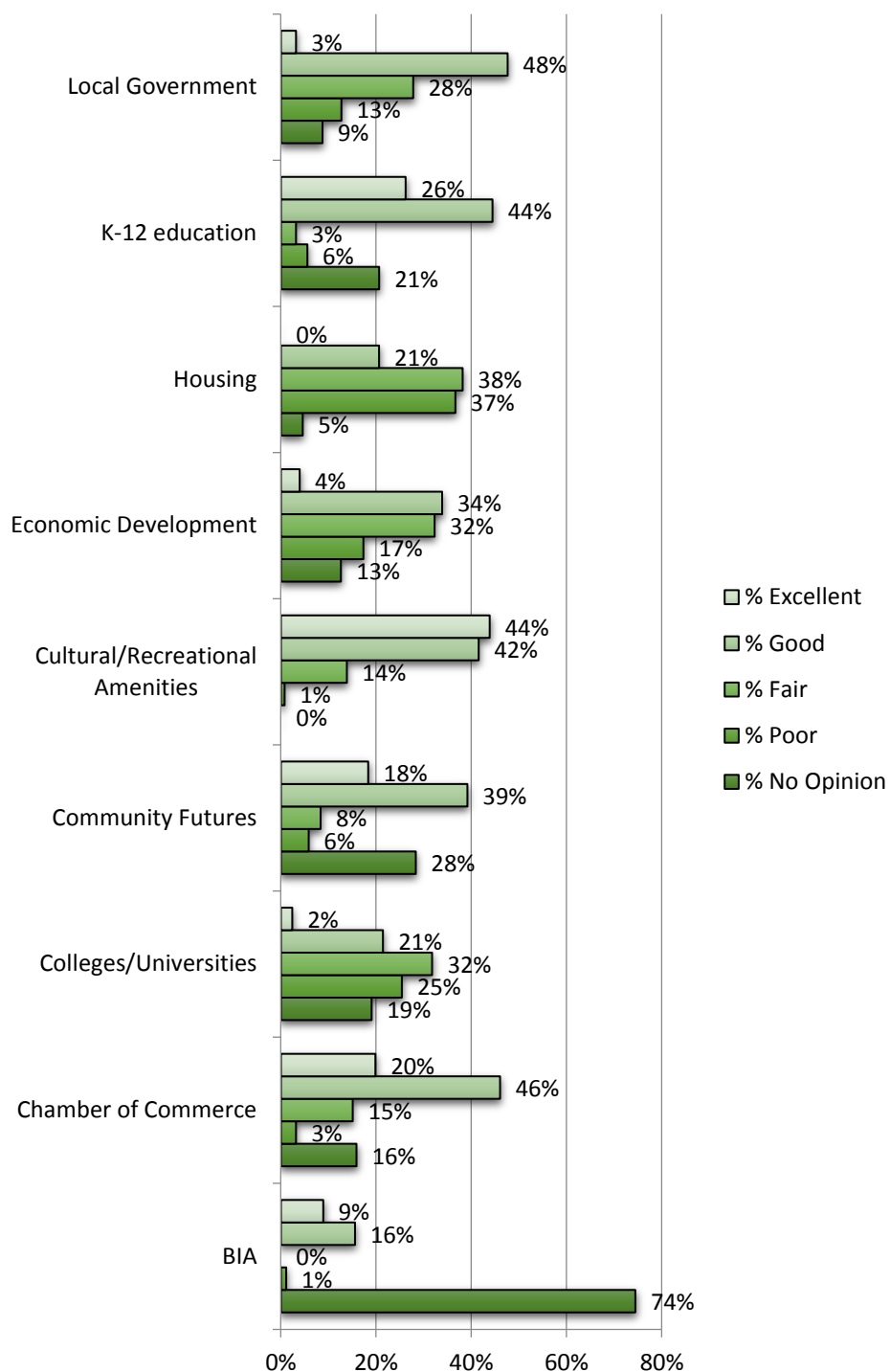
Note: 127 respondents

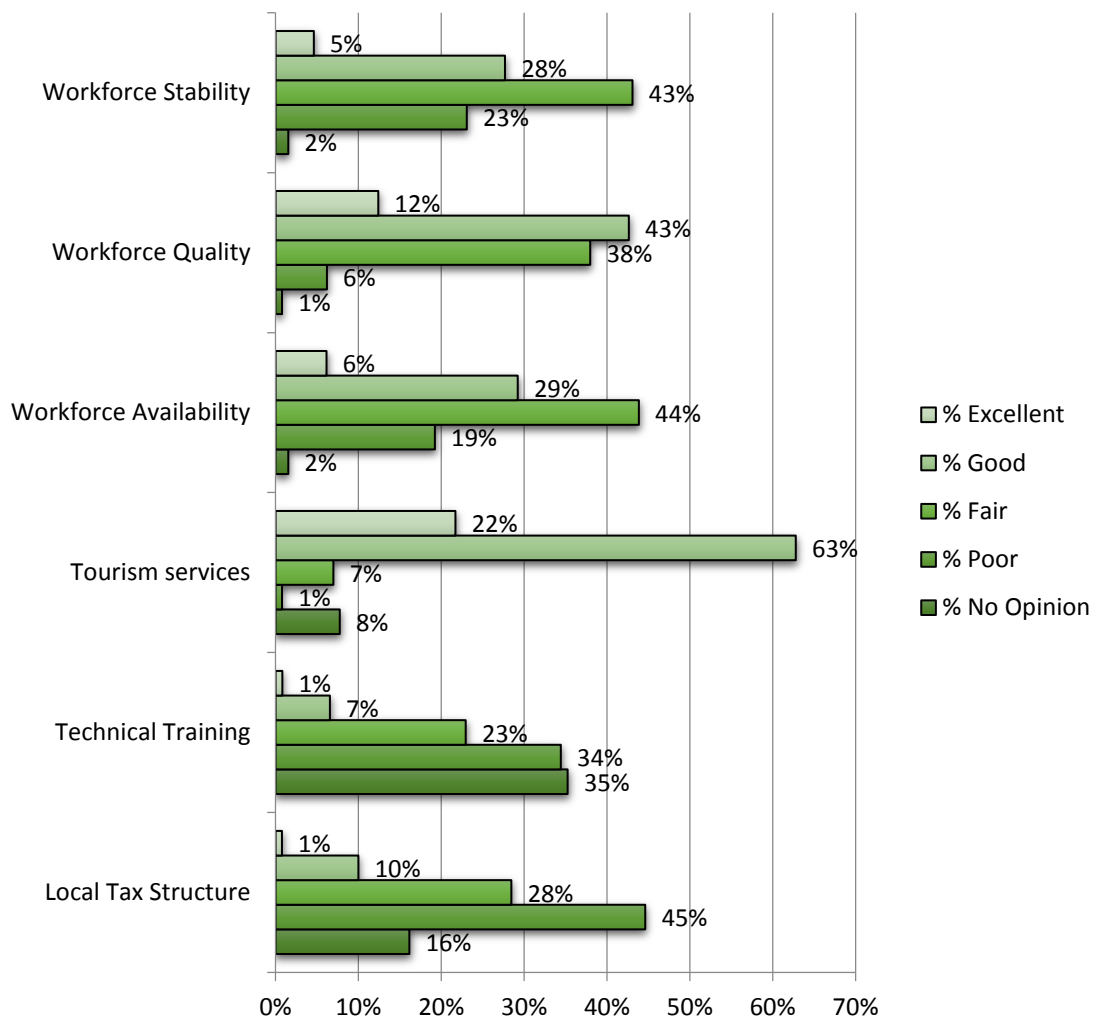
135 respondents were asked to rate the quality of a list of specific business climate factors as either poor, fair, good, excellent or no opinion to their business.

- The factors that received the highest number of **POOR** ratings included local tax structure (45% or 58 businesses) and housing (37% or 48 businesses).
- The factors that received the highest number of **FAIR** ratings included workforce availability (44% or 57 businesses) and workforce stability (43% or 56 businesses).
- The factors that received the highest number of **GOOD** ratings included tourism (63% or 81 businesses) and chamber of commerce (46% or 58 businesses).

- The factors that received the highest number of **EXCELLENT** ratings included cultural and recreational amenities (44% or 57 businesses) and K-12 education (26% or 33 businesses).
- The factors that received the highest number of **NO OPINION** ratings include the Business Improvement Association (BIA) (74% or 67 businesses), and Technical training (35% or 43 businesses).

Figure 74: Rating of business climate factors

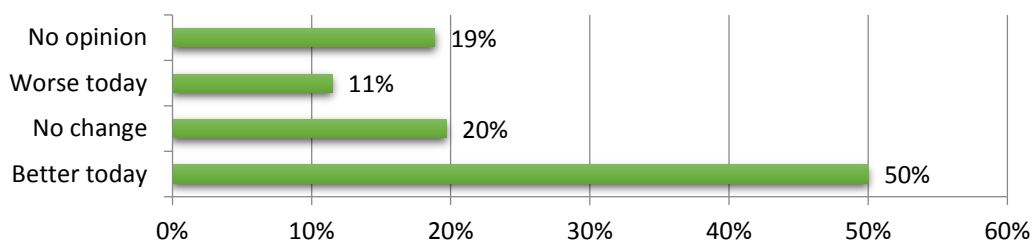




Note: number of respondents varies per question

50% of respondents (61 businesses) felt that the business climate is better today than it was 5 years ago. Of the 11% that believe the climate is worse, the responses varied widely and include: more competition, lack of business diversification, decline in tourism based events, forestry downturn, and expensive commercial real estate. A complete list can be found in Appendix A.

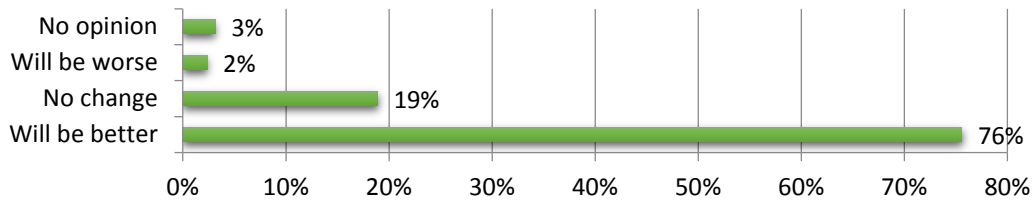
Figure 75: Business climate today vs. 5 years ago



Note: 122 respondents

76% of respondents (96 businesses) expect that the business climate will be better 5 years from today. Just 2% (3 businesses) expect that it will be worse.

Figure 76: Business climate 5 years from today

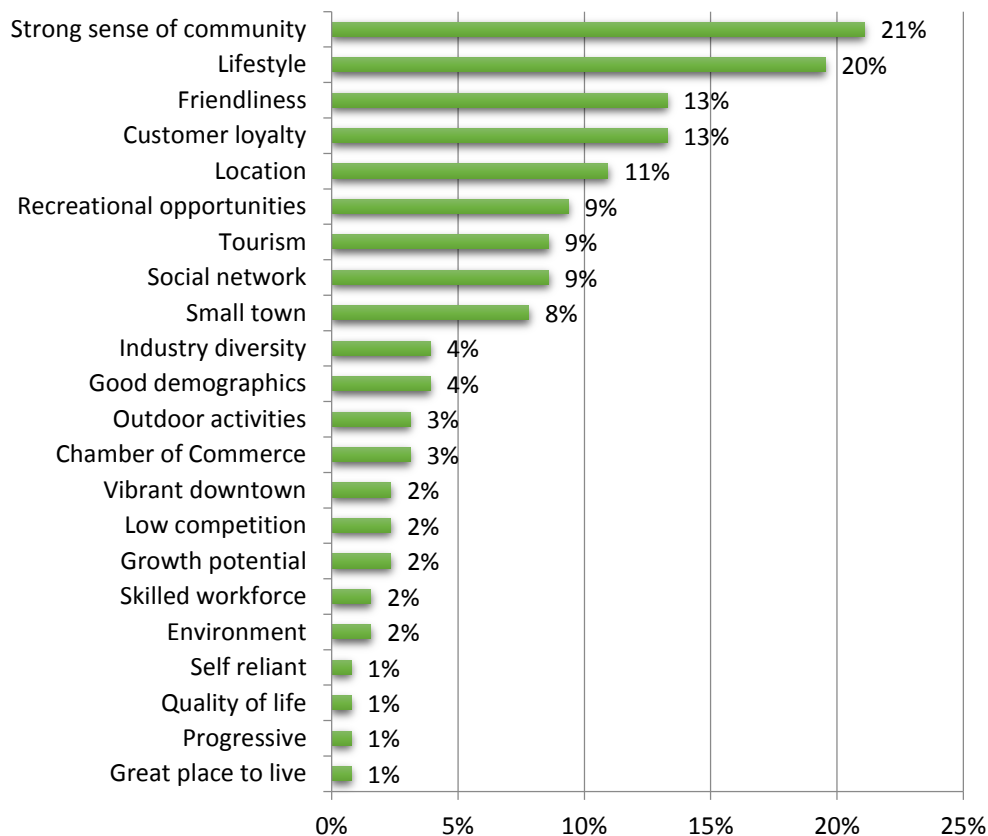


Note: 127 respondents

Strengths and Weaknesses of Business Climate

179 responses were provided when 128 respondents were asked to list the community's strengths as a place to do business; the highest number of responses (21% or 27 responses) cited the strong sense of community. 20% (25 businesses) indicated the lifestyle, and friendliness and customer loyalty were both equally cited (13% or 17 businesses).

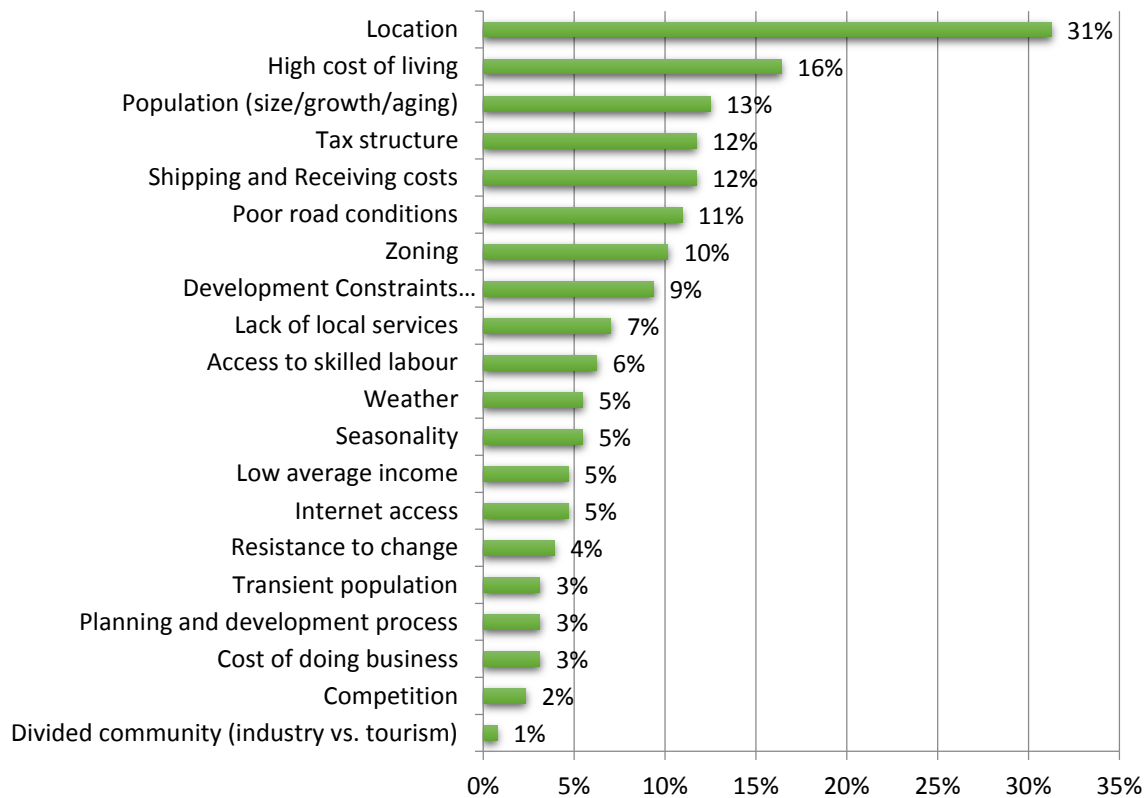
Figure 77: Community's strengths as a place to do business



Note: 128 respondents

210 responses were provided when respondents were asked to list the community's weaknesses as a place to do business; the highest number of responses (31% or 40 respondents) was received for the location. The high cost of living (16% or 21 respondents) and the population (referring to size, growth, and aging) (13% or 16 respondents) were also cited.

Figure 78: Community's weaknesses as a place to do business

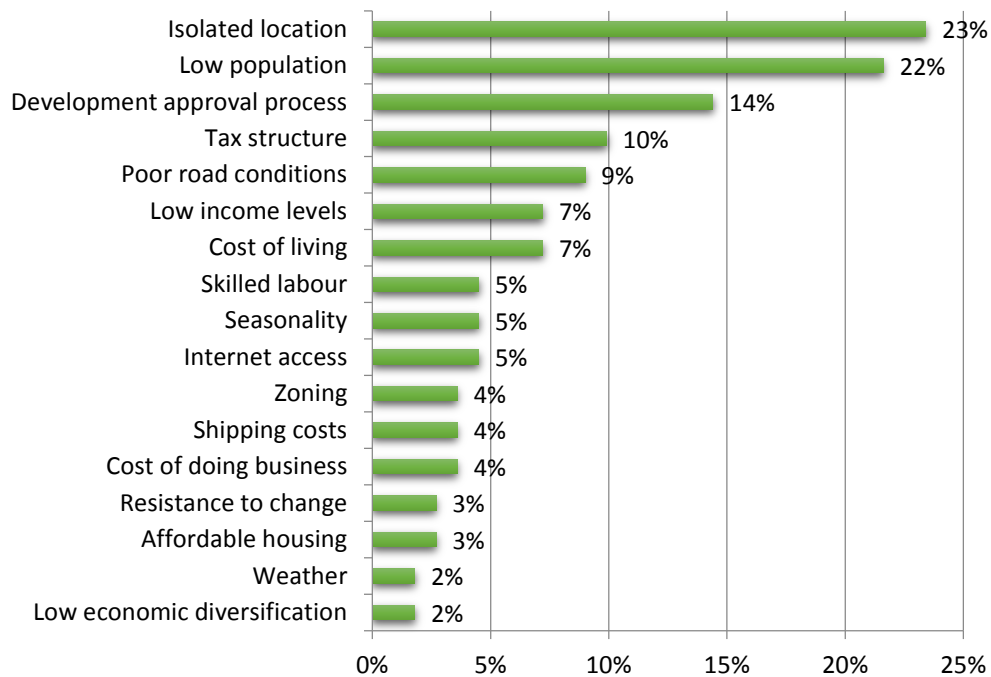


Note: 128 respondents

Business Growth

90% of respondents (114 businesses) indicated that there are barriers to growth. The highest number of respondents (23% or 26 businesses) stated that the isolated location is an important barrier to growing the community's economy. Other commonly cited barriers include low population (22% and 24 businesses) and the development approval process (14% or 16 businesses).

Figure 79: Barriers to growth in the community



Note: 111 respondents

The following excerpts illustrate the barriers cited:

“Size of market for most companies.”

“Development fees for new buildings.”

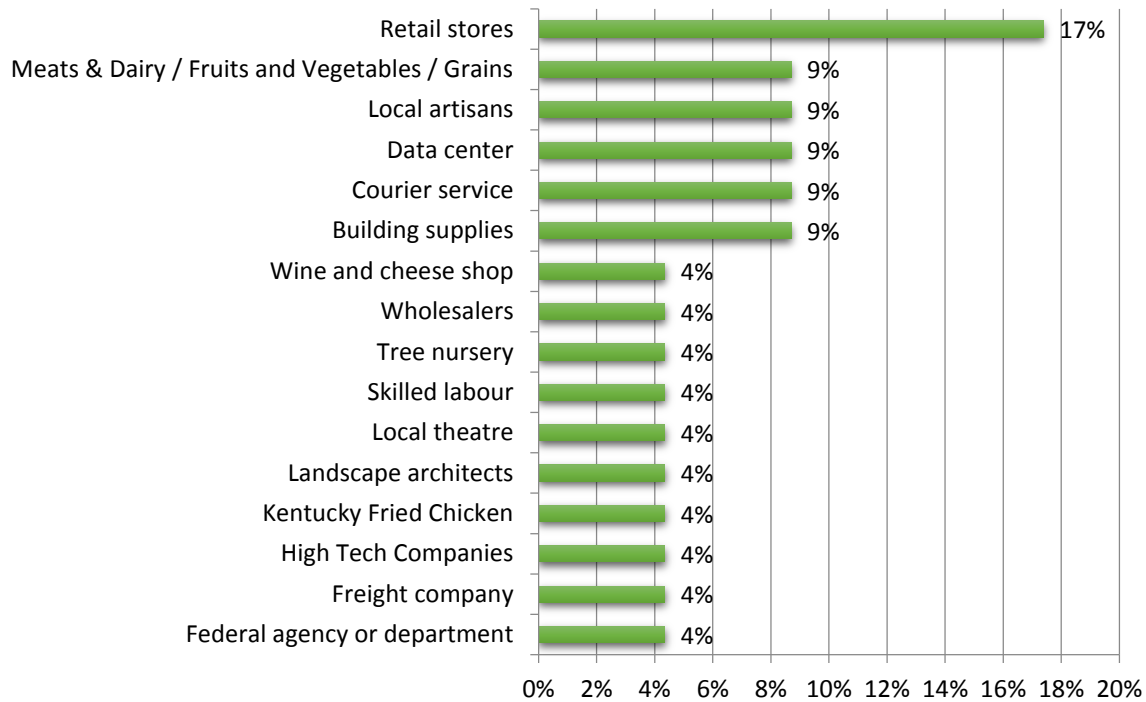
“Seasonality - transient market opportunities and population make it difficult for many businesses.”

“Population - number of people having babies affects market.”

“limited population and uninhabited surrounding area.”

78% of respondents (92 respondents) indicated that there were *not* suppliers that could locate in the region, with only 22% (26 businesses) indicating that there were. Retail stores (17% or 4 businesses) and meats and dairy/fruits and vegetables, local artisans, data centre, courier service, and building supplies were all cited by 9% or 2 businesses.

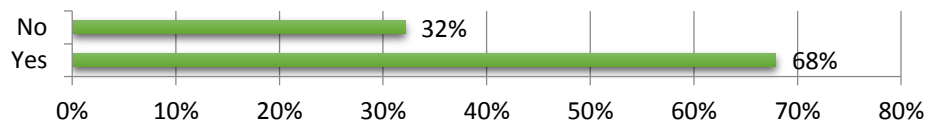
Figure 80: Potential Suppliers



Note: 23 respondents

68% of respondents (74 businesses) indicated that they do supply products or services to companies located in the community or region.

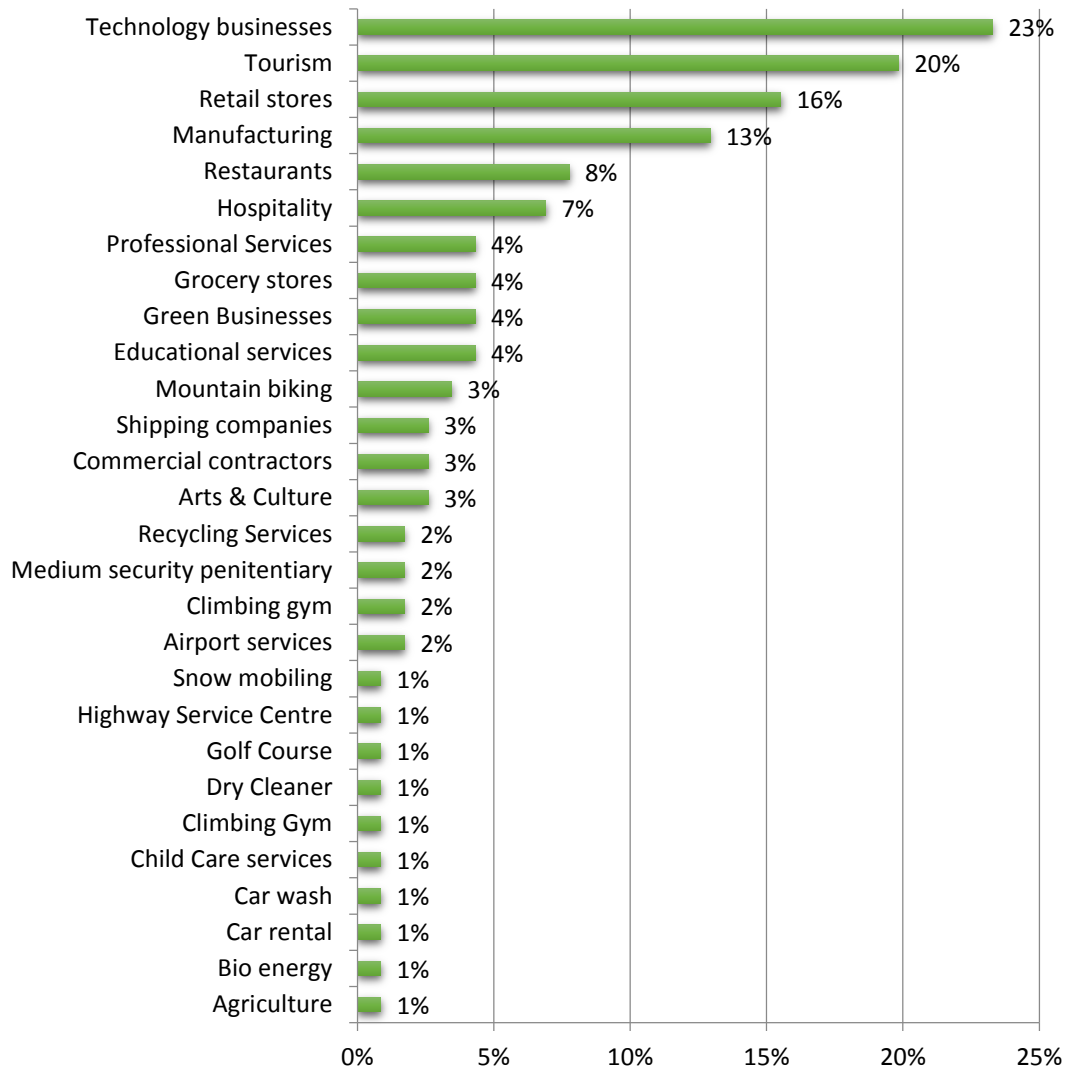
Figure 81: Supply to local companies



Note: 109 respondents

94% of respondents (116 businesses) indicated that there are sectors, businesses or industries that could be attracted to the region. Technology business was the most frequently cited (23% or 27 respondents), with tourism (20% or 23 businesses), retail stores (16% or 18 businesses) and manufacturing (13% or 15 businesses) being commonly cited.

Figure 82: Sectors, businesses or industries that could be attracted to region



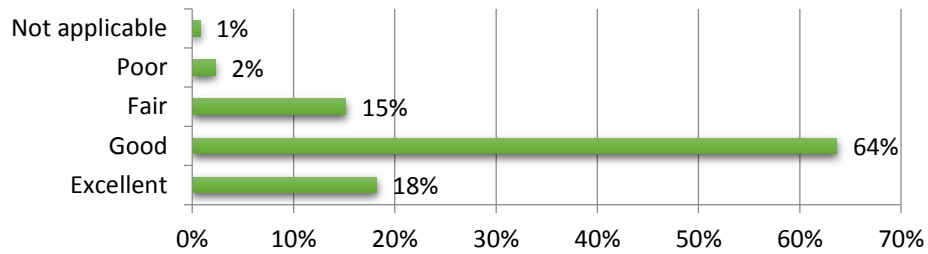
Note: 116 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (64% or 84 businesses), 18% (24 businesses) reported that their company's health is excellent, 15% (20 businesses) reported that it is fair, and 2% (3 businesses) indicated their company's health was poor.

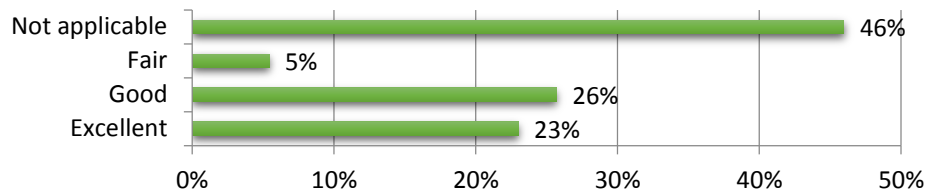
Figure 83: Facility's overall health



Note: 132 respondents

Most businesses with a parent company indicated that the health of that parent company is either good (26% or 19 businesses) or excellent (23% or 17 businesses).

Figure 84: Overall health of parent company

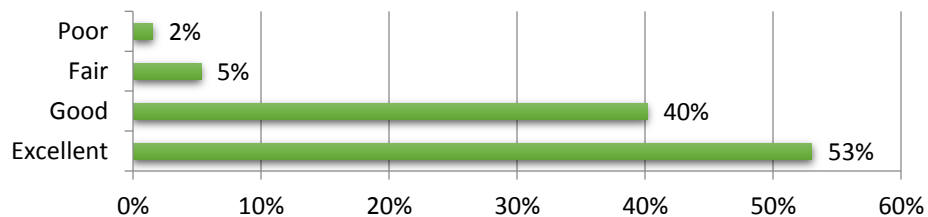


Note: 74 respondents

Attitude toward Community

53% of respondents (70 businesses) indicated that their local management's attitude toward the community is excellent and 40% (53 businesses) indicated that it is good.

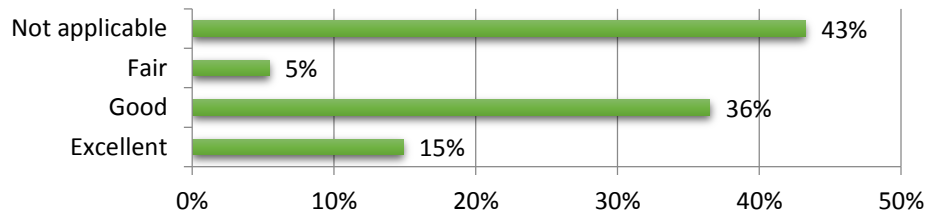
Figure 85: Local management's attitude toward community



Note: 132 respondents

The highest number of respondents (36% or 27 businesses) indicated that their parent company's attitude toward the local community is good.

Figure 86: Parent company's attitude toward local community

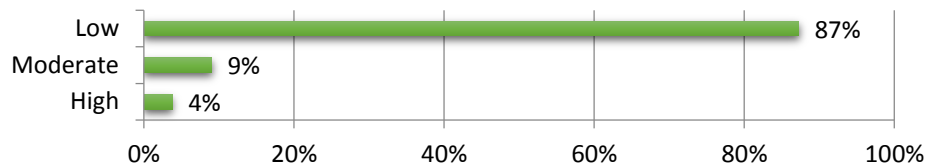


Note: 74 respondents

Risk of Closing or Downsizing

Data indicates that the risk of Revelstoke businesses closing or downsizing is low. Only 4% (5 businesses) of respondents reported that they are at a high risk of closing in the next 1-3 years.

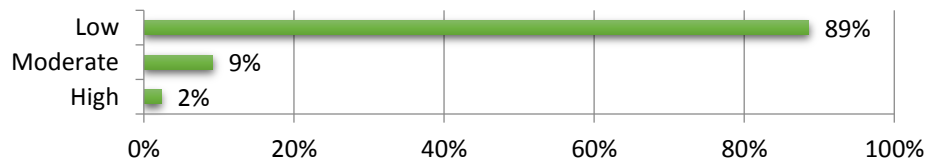
Figure 87: Risk of facility closing



Note: 133 respondents

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

Figure 88: Risk of facility downsizing



Note: 131 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by organizations interested in economic development in the City of Revelstoke and area 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 Official Community Plans (OCPs).

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 red and green-flags). Consider using the “Business Walk” survey as a tool to connect with businesses annually.
3. Host a business stakeholder forum to present findings, discuss common issues and potential solutions.
4. Host a facilitated action planning session with economic development stakeholders and industry representatives.
5. Based on results from the forums and action planning session, finalize priority actions, develop related action plans, update existing economic development plans and develop relationships with a broader network of support providers (at regional, provincial and national scales) to support implementation.
6. Establish a monitoring program to assess the impact of implementation efforts.

POTENTIAL ACTION AREAS

Small to medium sized, locally owned businesses

The following data indicates that the predominant business typology is small to medium sized, independently owned businesses: 72% of businesses surveyed indicate they do not have another location, few indicated that they have a parent company, the majority of businesses employ less than five employees, and 37% cite annual sales between \$100,000 and \$499,999. Actions to support and encourage small and medium sized businesses would be most appropriate for this target market and could include specific training targeted to the needs of small businesses, providing shared services to small businesses such as payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include exploring existing supports available from the provincial Small Business BC organisation, Tourism BC, or CBT's Basin Business Advisors Program.

Employment

Findings indicate that employees under the age of 25 and over the age of 50 are in the minority, making up just 11% respectively of the essential workforce. Increasing involvement in the local workforce for both of these age groups could be encouraged and could address the issues with recruitment and retention that businesses indicate they have. Actions on this theme could involve gaining a better understanding of the reasons for the low employment rate and would differ for the different age groups. Possible actions for youth include: connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions. Possible actions for people over 50 years of age, include raising the awareness of the benefits of hiring older workers, and exploring the opportunities within the federal Targeted Initiative for Older Workers (TIOU) program. These actions may assist in addressing the recruitment and retention challenges that businesses report having.

In addition to the age of employees, the survey findings indicate that 31% of employees are classed as 'temporary'. Temporary employment can impose hidden costs on employers (higher training costs, poorer levels of service etc.) and employees (anxiety from uncertainty, inability to plan/save, etc.). While heavier reliance on 'temporary' employment may be unavoidable in resort towns, it may be beneficial to discuss the causes and costs of temporary unemployment with the business community. This would assist in better understanding of the costs and any potential means of supporting both the business community and the local workforce.

Business Growth & Expansion

56% of businesses in the region report being in a growth cycle, and 48% indicate that they are planning to expand within the next three years. The majority of those businesses planning to expand feel their existing site is adequate, and the vast majority of expansion plans are expected to occur within the community. Businesses also report that employment rates are stable, with little change anticipated. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of connecting businesses with resources to assist in expansion projects, such as CBT's Basin Business Advisors Program. It is worth noting that only 34% of businesses planning an expansion sought assistance 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. These potential actions and any others, should be designed to address the stated barriers to expansion which include financing, lack of suitable premises, and local regulations.

Training

Businesses identified a need for training in the areas of safety/first aid/food safe, managerial training, customer service, and computer skills. Findings indicate that 54% of businesses do have a training budget, and that they have a preference for individual coaching sessions (54%), online/webinar (51%) style formats, or classroom setting (49%). Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in local programming. Awareness of the training opportunities currently available could also be promoted within the Revelstoke business community.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 8% of respondents indicated that they have a formal succession plan and only 40% have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Economic Stability & Diversification

The location, high cost of living and population demographics (7,139 according to 2011 census) were cited most frequently by local businesses as the greatest weaknesses and its greatest barrier to growth. While there is some support for local procurement, with 22% (23 businesses) indicating they purchase a majority of their supplies from local sources, increasing the support for existing businesses could improve business stability and address the challenges that a small population base and remote location create. Actions could also include supporting businesses to expand to virtual markets, and understanding what supplies are needed locally and finding ways of providing those supplies locally.

Businesses related to the tourism industry ('Retail and Wholesale Trade', 'Accommodation and Food Services' and 'Arts, Entertainment and Recreation') appear to be the main businesses represented in the BRE survey. Respondents indicated that technology based businesses and tourism related businesses could be attracted to the region. Actions to increase and support the tourism industry could include continued collaboration between government and local tourism agencies such as Destination British Columbia, Tourism Revelstoke, the Revelstoke Chamber of Commerce, and local businesses. Increasing the technology sectors representation could involve working with the Kootenay Association for Science and Technology (KAST) to understand how

Revelstoke can expand this sector. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Retail and Wholesale Trade	41-45	27	20%
Accommodation and Food Services	72	19	14%
Arts, Entertainment and Recreation	71	15	11%
Professional, Scientific and Technical Services	54	13	10%
Manufacturing	31-33	12	9%
Construction	23	10	7%
Health Care and Social Assistance	62	8	6%
Finance and Insurance	52	7	5%
Other Services	81	6	4%
Information and Cultural Industries	51	5	4%
Real Estate and Rental and Leasing	53	4	3%
Administrative Support, Waste Management and Remediation	56	4	3%
Agriculture, forestry, fishing and hunting	11	3	2%
Transportation and Warehousing	48-49	1	1%
Educational Services	61	1	1%
Total		135	100%

Survey Participants: 135
 Question Respondents: 135
 No Response Count: 0
 Response Rate: 100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Engineering/RD	13	11%
Manufacturing	14	12%
Warehousing	23	19%
Distribution	26	21%
Headquarters	69	57%
Services	116	96%
Total	261	

Survey Participants: 135

Question Respondents: 121
 No Response Count: 14
 Response Rate: 90%

Figure 3: Who are your primary competitors?: Where are your competitors located?	Count	Percent of Question Respondents
Outside Canada	10	8%
In Canada	12	9%
In Province	119	90%
None	4	3%
Total	145	

Survey Participants: 135
 Question Respondents: 132
 No Response Count: 3
 Response Rate: 98%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Adaptability	2	2%
Branding	2	2%
Knowledgeable staff	2	2%
Natural resources	2	2%
Established business	3	2%
Reputation	3	2%
Competitive pricing	4	3%
Knowledge	4	3%
Hard work	6	5%
Networking	6	5%
Tourism	6	5%
Customer loyalty	7	5%
Diversified product / services	9	7%
Customer service	10	8%
Lack of competition	12	9%
Niche product	12	9%
Workforce / Staff	15	11%
Community support	18	14%
Demand for products and services	18	14%
Location	21	16%
Quality product / service	28	21%

Total	190
Survey Participants:	135
Question Respondents:	131
No Response Count:	4
Response Rate:	97%

Figure 5: Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Business expansion	2	2%
Connections to the community	2	2%
Moved business when husband relocated	2	2%
Market growth	4	3%
Experience in the business	5	4%
Natural resources	6	5%
Close to family	7	5%
Great community	7	5%
Already living here	10	8%
Established business	13	10%
Born and raised here	16	12%
Bought an existing business	18	14%
Location	18	14%
Business opportunity	23	17%
Lifestyle	35	27%
Total	168	

Survey Participants:	135
Question Respondents:	132
No Response Count:	3
Response Rate:	98%

Figure 6: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	36	28%
No	93	72%
Total	129	

Survey Participants:	135
Question Respondents:	129
No Response Count:	6
Response Rate:	96%

Figure 7: Does this company have another location elsewhere?: If Yes, where?	Count	Percent of Question Respondents
Outside Canada	4	11%
Elsewhere in nation	11	31%
In Province	28	80%
Total	43	

Survey Participants: 135
 Question Respondents: 35
 No Response Count: 1
 Parent Question 'Yes' Respondents: 36
 Parent Question Respondents: 129
 Response Rate: 97%

Figure 8a: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	3	3%
Elsewhere in nation	4	3%
In Province	108	94%
Total	115	

Survey Participants: 135
 Question Respondents: 115
 No Response Count: 20
 Response Rate: 85%

Figure 8b: Location of company's headquarters: Province	Count	Percent of Question Respondents
AB	1	1%
IL	1	1%
MS	1	1%
WA	1	1%
ON	4	4%
BC	95	92%
Total	103	

Survey Participants: 135
 Question Respondents: 103
 No Response Count: 32
 Response Rate: 76%

Figure 8c: Location of company's headquarters: Nation	Count	Percent of Question Respondents
United States	3	3%
Canada	115	97%
Total	118	

Survey Participants: 135
 Question Respondents: 118
 No Response Count: 17
 Response Rate: 87%

Figure 8d: Corporate headquarters location, if different than local location	Count	Percent of Question Respondents
Canada	13	100%
Total	13	

Survey Participants: 135
 Question Respondents: 13
 No Response Count: 122
 Response Rate: 10%

Figure 9: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	7	5%
Emerging	12	9%
Growing	74	56%
Maturing	40	30%
Total	133	

Survey Participants: 135
 Question Respondents: 133
 No Response Count: 2
 Response Rate: 99%

Figure 10: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	7	5%
1-4 Years	24	19%
5-9 Years	32	25%
10-19 Years	25	20%

>20 Years	40	31%
Total	128	

Survey Participants: 135
 Question Respondents: 128
 No Response Count: 7
 Response Rate: 95%

Figure 11a: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	11	8%
Privately owned	120	92%
Total	131	

Survey Participants: 135
 Question Respondents: 131
 No Response Count: 4
 Response Rate: 97%

Figure 11b: What is this company's legal status?	Count	Percent of Question Respondents
Limited liability partnership (LLP)	4	3%
Non-profit	7	5%
Partnership	10	7%
Sole proprietorship	36	27%
Corporation	73	54%
Other	4	3%
Total	134	

Survey Participants: 135
 Question Respondents: 134
 No Response Count: 1
 Response Rate: 99%

Figure 11c: What is this company's legal status?: If <i>Other</i>, please specify	Count	Percent of Question Respondents
Family Trust	1	0.75%
Federally Incorporated Not-for-Profit	1	0.75%
Cooperative	2	1.49%
Total	4	

Survey Participants: 135
 Question Respondents: 4
 No Response Count: 0
 Parent Question 'Other' Respondents: 4
 Parent Question Respondents: 134
 Response Rate: 100%

Figure 12a: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	35	26%
No	98	74%
Total	133	

Survey Participants: 135
 Question Respondents: 133
 No Response Count: 2
 Response Rate: 99%

Figure 12b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Negative	1	3%
Neutral	6	18%
Positive	26	79%
Total	33	

Survey Participants: 135
 Question Respondents: 33
 No Response Count: 2
 Parent Question 'Yes' Respondents: 35
 Parent Question Respondents: 133
 Response Rate: 94%

Figure 13a: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	16	13%
No	107	87%
Total	123	

Survey Participants: 135
 Question Respondents: 123
 No Response Count: 12

Response Rate:

91%

Figure 13b: If Yes, what is the anticipated time frame	Count	Percent of Question Respondents
1 year or less	4	31%
2 years	3	23%
3 years or more	6	46%
Total	13	

Survey Participants: 135
 Question Respondents: 13
 No Response Count: 3
 Parent Question 'Yes' Respondents: 16
 Parent Question Respondents: 123
 Response Rate: 81%

Figure 14a: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Close the business down	1	8%
Sell to another company	1	8%
Sell/transfer to a family member	3	25%
Sell/transfer to a non-family member	5	42%
Other	2	17%
Total	12	

Survey Participants: 135
 Question Respondents: 12
 No Response Count: 4
 Parent Question 'Yes' Respondents: 16
 Parent Question Respondents: 123
 Response Rate: 75%

Figure 14b: If Yes, how do you intend to exit the business?: If other, please explain	Count	Percent of Question Respondents
Clinic Manager Change	1	8%
Loss of partner	1	8%
Transfer to other management	1	8%
Total	3	

Survey Participants: 135
 Question Respondents: 3
 No Response Count: 0
 Parent Question 'Other' Respondents: 2
 Parent Question Respondents: 12
 Response Rate: 75%

Figure 15a: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	10	8%
No	116	92%
Total	126	

Survey Participants: 135
 Question Respondents: 126
 No Response Count: 9
 Response Rate: 93%

Figure 15b: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	10	8%
No	105	84%
Not applicable	10	8%
Total	125	

Survey Participants: 135
 Question Respondents: 125
 No Response Count: 10
 Response Rate: 93%

Figure 15c: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	4	67%
No	2	33%
Total	6	

Survey Participants: 135
 Question Respondents: 6
 No Response Count: 4
 Parent Question 'Yes' Respondents: 10
 Parent Question Respondents: 125

Response Rate: 60%

Figure 15d: If Yes, by whom	Count	Percent of Question Respondents
Banker	1	25%
Lawyer	1	25%
Accountant	2	50%
Total	4	

Survey Participants: 135
Question Respondents: 4
No Response Count: 0
Parent Question 'Yes' Respondents: 4
Parent Question Respondents: 6
Response Rate: 100%

Figure 15e: If Yes, by whom: If <i>other</i>, please explain	Count	Percent of Question Respondents
Total	0	

Survey Participants: 135
Question Respondents: 0
No Response Count: 0
Parent Question 'Other' Respondents: 0

Figure 16: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	54	40%
No	81	60%
Total	135	

Survey Participants: 135
Question Respondents: 135
No Response Count: 0
Response Rate: 100%

LOCAL WORKFORCE

Figure 17a: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	59	44%
5 -9	35	26%
10 -19	19	14%
20-49	13	10%
50-99	7	5%
Over 100	2	1%
Total	135	

Total employees: 2081
 Survey Participants: 135
 Question Respondents: 135
 No Response Count: 0
 Response Rate: 100%

Figure 17b: Number of Full-Time Employees	Count	Percent of Question Respondents
Less than 5	92	68%
5 - 0	22	16%
10 -19	8	6%
20-49	9	7%
50-99	2	1%
Over 100	2	1%
Total	135	

Total full-time employees: 1059
 Survey Participants: 135
 Question Respondents: 135
 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	115	86%
5 - 9	7	5%
10 - 19	7	5%
20-49	4	3%
Total	133	

Total part-time employees: 368

Survey Participants: 135
 Question Respondents: 133
 No Response Count: 2
 Response Rate: 99%

Figure 17d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	108	81%
9-May	12	9%
19-Oct	9	7%
20-49	2	2%
50-99	1	1%
Over 100	1	1%
Total	133	

Total temporary employees: 654
 Survey Participants: 135
 Question Respondents: 133
 No Response Count: 2
 Response Rate: 99%

Figure 18: Nature of Employment	Count	Percent of Question Respondents
Full Time	1059	51%
Part Time	368	18%
Temporary	654	31%
Total	2081	

Survey Participants: 135
 Question Respondents: 135
 Response Rate: 100.00%

Figure 19: Historical employment trend	Count	Percent of Question Respondents
Declining	13	11%
Staying the same	68	57%
Increasing	38	32%
Total	119	

Survey Participants: 135
 Question Respondents: 119
 No Response Count: 16
 Response Rate: 88%

Figure 20a: How did the number of staff change, if at all, in the last 3 years?: Full time	Count	Percent of Question Respondents
Increased	27	22%
Stayed the same	90	73%
Decreased	7	6%
Total	124	

Survey Participants: 135
 Question Respondents: 124
 No Response Count: 11
 Response Rate: 92%

Figure 20b: How did the number of staff change, if at all, in the last 3 years?: Part time	Count	Percent of Question Respondents
Increased	32	26.02%
Stayed the same	83	67.48%
Decreased	8	6.50%
Total	123	

Survey Participants: 135
 Question Respondents: 123
 No Response Count: 12
 Response Rate: 91%

Figure 20c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	12	11%
Stayed the same	97	85%
Decreased	5	4%
Total	114	

Survey Participants: 135
 Question Respondents: 114
 No Response Count: 21
 Response Rate: 84%

Figure 21a: Projected number of employees at this facility in three years*	Count	Percent of Question Respondents
Less than 5	48	36%

5 - 9	38	28%
10 - 19	26	19%
20-49	14	10%
50-99	7	5%
Over 100	2	1%
Total	135	

Survey Participants: 135
Question Respondents: 135
No Response Count: 0
Response Rate: 100%

Figure 21b: Projected number of employees at this facility in one year*	Count	Percent of Question Respondents
Less than 5	55	40.74%
9-May	36	26.67%
19-Oct	21	15.56%
20-49	14	10.37%
50-99	7	5.19%
Over 100	2	1.48%
Total	135	

Survey Participants: 135
Question Respondents: 135
No Response Count: 0
Response Rate: 100%

Figure 21c: How do you expect the number of staff to change, if at all over the next 3 years?: Casual	Count	Percent of Question Respondents
Increased	18	16%
Stayed the same	89	81%
Decreased	3	3%
Total	110	

Survey Participants: 135
Question Respondents: 110
No Response Count: 25
Response Rate: 81%

Figure 21b: How do you expect the number of staff to change, if at all over the next 3 years?:	Count	Percent of Question Respondents

Part time		
Increased	42	35%
Stayed the same	70	59%
Decreased	7	6%
Total	119	

Survey Participants: 135
Question Respondents: 119
No Response Count: 16
Response Rate: 88%

Figure 21a: How do you expect the number of staff to change, if at all over the next 3 years?: Full time	Count	Percent of Question Respondents
Increased	43	35%
Stayed the same	76	61%
Decreased	5	4%
Total	124	

Survey Participants: 135
Question Respondents: 124
No Response Count: 11
Response Rate: 92%

Figure 22: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	12	11%
26 - 34	42	37%
35 - 49	48	42%
50 or older	12	11%
Total	114	

Survey Participants: 135
Question Respondents: 114
No Response Count: 21
Response Rate: 84%

Figure 23a: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
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Lower than	12	13%
Same as	47	53%
Greater than	30	34%
Total	89	

Survey Participants: 135
 Question Respondents: 89
 No Response Count: 46
 Response Rate: 66%

Figure 23b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
Under \$10	1	1%
\$10-\$12.99	2	3%
\$15-\$19.99	21	30%
\$20-\$29.99	26	37%
\$30-49.99	11	15%
\$50-\$99	9	13%
\$100 or more	1	1%
Total	71	

Survey Participants: 135
 Question Respondents: 71
 No Response Count: 64
 Response Rate: 53%

Figure 23c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
Under \$10	1	1%
\$10-\$12.99	6	9%
\$13-\$14.99	15	22%
\$15-\$19.99	22	32%
\$20-\$29.99	21	30%
\$30-49.99	4	6%
Total	69	

Survey Participants: 135
 Question Respondents: 69
 No Response Count: 66
 Response Rate: 51%

Figure 23d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
\$10-\$12.99	30	53%
\$13-\$14.99	12	21%

\$15-\$19.99	13	23%
\$20-\$29.99	2	4%
Total	57	

Survey Participants: 135
 Question Respondents: 57
 No Response Count: 78
 Response Rate: 42%

Figure 24: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	71	85%
Decreasing	3	4%
Increasing	10	12%
Total	84	

Survey Participants: 135
 Question Respondents: 84
 No Response Count: 51
 Response Rate: 62%

Figure 25: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Nationally	4	3%
Internationally	7	5%
Provincially	10	8%
Locally	108	84%
Total	129	

Survey Participants: 135
 Question Respondents: 129
 No Response Count: 6
 Response Rate: 96%

Figure 26a: Recruitment and retention challenges	Count	Percent
Retention challenges	40	32%
Recruitment challenges	48	39%

Figure 26b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	40	32%
No	85	68%
Total	125	

Survey Participants: 135
 Question Respondents: 125
 No Response Count: 10
 Response Rate: 93%

Figure 27a: Is the company experiencing recruitment problems with any employee positions or skills?	Count	Percent of Question Respondents
Yes	48	37.80%
No	79	62.20%
Total	127	

Survey Participants: 135
 Question Respondents: 127
 No Response Count: 8
 Response Rate: 94%

Figure 27b: Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?	Count	Percent of Question Respondents
General Laborer	1	2%
Machine Operators	1	2%
Mechanics	1	2%
Prof/Info Tech/Programming	1	2%
Professional/Other	1	2%
Administrative/Clerical	2	4%
Construction/Contractors	2	4%
Healthcare Professionals	2	4%
Material/Fabricators	2	4%
Professional/Technical	2	4%
Sales/Service	2	4%
CDL Drivers	3	7%
Maintenance	3	7%
Hospitality Service	4	9%
Food/Beverage Service	6	13%
Sales/Retail	6	13%
Other	22	49%
Total	61	

Survey Participants: 135

Question Respondents: 45
 No Response Count: 3
 Parent Question 'Yes' Respondents: 48
 Parent Question Respondents: 127
 Response Rate: 94%

Figure 27c: Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)	Count	Percent of Question Respondents
Aerial maintenance workers	1	2%
Arborists	1	2%
Auto Body Refinishers	1	2%
Childcare workers	1	2%
Embalmer/Funeral director	1	2%
Estheticians	1	2%
Gymnastics Coaches	1	2%
Hair Stylists	1	2%
Hearing Instrument Practitioners	1	2%
Herbalist	1	2%
Hook Tenders	1	2%
Jewelers	1	2%
Marketing professionals	1	2%
Plumbers	1	2%
Welders	1	2%
Yoga Instructors	1	2%
Cooks / Bakers / Butchers	2	4%
Students	2	4%
Managers	3	7%
Total	23	

Survey Participants: 135
 Question Respondents: 22
 No Response Count: 0
 Parent Question 'Other' Respondents: 22
 Parent Question Respondents: 45

Response Rate: 100%

Figure 28a: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	47	39%
No	74	61%
Total	121	

Survey Participants: 135

Question Respondents: 121

No Response Count: 14

Response Rate: 90%

Figure 28b: Do you anticipate future recruiting difficulties i.e. 3-5 year? : If Yes, in what area(s)?	Count	Percent of Question Respondents
Construction/Contractors	1	4%
Hospitality Service	1	4%
Machine Operators	1	4%
Material/Fabricators	1	4%
Mechanics	1	4%
Professional/Technical	1	4%
Maintenance	2	7%
Sales/Service	2	7%
Food/Beverage Service	3	11%
Sales/Retail	3	11%
General Laborer	6	21%
Other	13	46%
Total	35	

Survey Participants: 135

Question Respondents: 28

No Response Count: 19

Parent Question 'Yes' Respondents: 47

Parent Question Respondents: 121

Response Rate: 60%

Figure 28c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify	Count	Percent of Question Respondents
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job roles/titles)		
Arborists	1	4%
Diesel Technicians	1	4%
Dishwashers	1	4%
Estheticians	1	4%
Gymnastics Coaches	1	4%
Hook Tenders	1	4%
Legal Assistants	1	4%
Managers	1	4%
Marketing professionals	1	4%
Total	9	

Survey Participants: 135
 Question Respondents: 13
 No Response Count: 0
 Parent Question 'Other' Respondents: 13
 Parent Question Respondents: 28
 Response Rate: 100%

Figure 29a: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	42	38%
No	69	62%
Total	111	

Survey Participants: 135
 Question Respondents: 111
 No Response Count: 24
 Response Rate: 82%

Figure 29b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent of Question Respondents
Apprenticeship resources and grants	1	2%
Attract talented people	1	2%

Business education	1	2%
Develop a multi-skilled workforce	1	2%
Eliminate seasonal peaks and valleys	1	2%
Employment center should provide more resources for employers	1	2%
Encourage leadership and funding	1	2%
Encourage trades in high school	1	2%
Help find qualified sales and service staff	1	2%
Improve visitor and business information centers	1	2%
Mentorship Program	1	2%
Offer both summer and winter job opportunities	1	2%
Offer short courses	1	2%
Provide a good connection to universities and summer students	1	2%
Seminars	1	2%
Sharing of resources and employees between business	1	2%
Support existing businesses	1	2%
Support staff and short term employment during shoulder seasons	1	2%
Tie industry/business schools	1	2%
Work terms for students	1	2%
Closer relationship with workBC	2	5%
Compensate small businesses with student grant programs	2	5%
Establish a job bank	2	5%

Help with foreign worker program	2	5%
Incentives for small businesses to hire	2	5%
Job fairs	2	5%
Lower business taxes	2	5%
Provide accommodation for seasonal staff	2	5%
Subsidized student works programs	2	5%
Provide training support	3	7%
Support affordable housing	4	10%
Better job advertising	5	12%
Bring cost of living down	6	15%
Total	56	

Survey Participants: 135
 Question Respondents: 41
 No Response Count: 1
 Parent Question 'Yes' Respondents: 42
 Parent Question Respondents: 111
 Response Rate: 98%

Figure 30a: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	32	25%
25 to 49%	31	24%
50 to 74%	23	18%
75 to 100%	44	34%
Total	130	

Survey Participants: 135
 Question Respondents: 130
 No Response Count: 5
 Response Rate: 96%

Figure 30b: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	61	47%
25 to 49%	36	28%
50 to 74%	19	15%
75 to 100%	14	11%

Total	130	
Survey Participants:	135	
Question Respondents:	130	
No Response Count:	5	
Response Rate:	96%	

Figure 30c: Percent of workforce: Entry-level	Count	Percent of Question Respondents
less than 25%	83	63.85%
25 to 49%	17	13.08%
50 to 74%	25	19.23%
75 to 100%	5	3.85%
Total	130	

Survey Participants: 135
Question Respondents: 130
No Response Count: 5
Response Rate: 96%

Figure 30d: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	53	41%
Semi-skilled	23	18%
Entry-level	19	15%
Total	95	

Survey Participants: 135
Question Respondents: 130
Response Rate: 96.30%

Figure 31a: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	59	46%
No	70	54%
Total	129	

Survey Participants: 135
Question Respondents: 129
No Response Count: 6
Response Rate: 96%

Figure 31b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	107	83%

No	22	17%
Total	129	

Survey Participants: 135
 Question Respondents: 129
 No Response Count: 6
 Response Rate: 96%

Figure 31c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	46	37%
No	78	63%
Total	124	

Survey Participants: 135
 Question Respondents: 124
 No Response Count: 11
 Response Rate: 92%

Figure 32: 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	68	58%
No	50	42%
Total	118	

Survey Participants: 135
 Question Respondents: 118
 No Response Count: 17
 Response Rate: 87%

Figure 33a: 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	88	72%
No	34	28%
Total	122	

Survey Participants: 135
 Question Respondents: 122
 No Response Count: 13

Response Rate:

90%

Figure 33b: 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
Apprenticeship	1	1%
Arborist training	1	1%
Barista	1	1%
Bidding processes	1	1%
Bike Mechanics	1	1%
Boot fitting	1	1%
Cable systems repair	1	1%
Certification	1	1%
Communications	1	1%
Community planning	1	1%
Counsellor	1	1%
Early Childhood Education	1	1%
Emerging technologies	1	1%
Grant writing	1	1%
Graphic design	1	1%
Herbalist training	1	1%
Industrial equipment operations	1	1%
Mechanical skills	1	1%
Multi-skills training	1	1%
Office skills	1	1%
Plumbing	1	1%
Professional development	1	1%
RFP design	1	1%
Skilled trades	1	1%
Theatre Technical Skills	1	1%
Web site design	1	1%
Wood working courses	1	1%
Cooking skills	2	2%
Professional driver training	3	3%
Accounting/Bookkeeping	6	7%
Product / Business knowledge	6	7%
Business management	7	8%

Sales/Marketing	7	8%
Computer skills	8	9%
Customer service	8	9%
Managerial training	11	13%
Safety/First Aid/Food Safe	17	20%
Total	102	

Survey Participants: 135
 Question Respondents: 86
 No Response Count: 2
 Parent Question 'Yes' Respondents: 88
 Parent Question Respondents: 122
 Response Rate: 98%

Figure 34: What new training might you need to consider in the next five years?	Count	Percent of Question Respondents
Aluminum body repairs	1	1%
Avalanche safety training	1	1%
Brain mapping	1	1%
Building Certification	1	1%
Climate change	1	1%
Customer service	1	1%
Data analytics	1	1%
Early Childhood Education	1	1%
Fiber optics	1	1%
Financial training	1	1%
Health and Safety	1	1%
Lean manufacturing	1	1%
Management training	1	1%
Marketing	1	1%
Mechanical and electrical training	1	1%
Not sure	1	1%
Project Management	1	1%
Resource management	1	1%
Snow bike maintenance and repairs	1	1%
Strategic planning	1	1%
Technical Theatre production	1	1%

Theatre equipment technical training	1	1%
Food Safe	2	2%
GIS training	2	2%
Government regulations	2	2%
Legal framework and regulations	2	2%
Online marketing	2	2%
Online payment systems	2	2%
Point of sales systems training	2	2%
Automation / Robotics	4	5%
Product training	4	5%
Emerging industry practices	8	10%
Emerging technologies	8	10%
Computer and technology training	16	20%
None	8	10%
Total	84	

Survey Participants: 135

Question Respondents: 82

No Response Count: 53

Response Rate: 61%

Figure 35a: What modes of education/training work best for you?	Count	Percent of Question Respondents
Classroom	53	49%
Online/ Webinar training	56	51%
Individual coaching	59	54%
Other	14	13%
Total	182	

Survey Participants: 135

Question Respondents: 109

No Response Count: 26

Response Rate: 81%

Figure 35b: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Canadian Avalanche Training	1	1%

Certification Challenge Courses	1	1%
Construction Certifications	1	1%
National Coaching Programs	1	1%
Peer to Peer	1	1%
Technical training sessions	1	1%
In-house / Hands on / Workshop	3	3%
Trade shows / Conferences	4	4%
Total	13	

Survey Participants: 135
 Question Respondents: 13
 No Response Count: 1
 Parent Question 'Other' Respondents: 14
 Parent Question Respondents: 109
 Response Rate: 93%

Figure 36: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	7	8%
Rest of Canada	17	20%
British Columbia	24	29%
Regional	36	43%
Local	52	62%
Total	136	

Survey Participants: 135
 Question Respondents: 84
 No Response Count: 51
 Response Rate: 62%

Union status	Count	Percent of Question Respondents
Yes	2	2%
No	128	98%
Not applicable	1	1%
Total	131	

Survey Participants: 135
 Question Respondents: 131
 No Response Count: 4
 Response Rate: 97%

SALES

Figure 37: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	2	2%
\$49,999 to \$25,000	10	11%
\$99,999 to \$50,000	11	12%
\$499,999 to \$100,000	35	37%
\$999,999 to \$500,000	14	15%
\$4.9 million to 1 million	13	14%
\$9.9 million to 5 million	6	6%
\$19.9 million to 10 million	2	2%
\$50 million to 20 million	2	2%
Total	95	

Survey Participants: 135
 Question Respondents: 95
 No Response Count: 40
 Response Rate: 70%

Figure 38: Is the market for your product	Count	Percent of Question Respondents
Stable	51	38%
Decreasing	6	4%
Increasing	78	58%
Total	135	

Survey Participants: 135
 Question Respondents: 135
 No Response Count: 0
 Response Rate: 100%

Figure 39: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents

Stable	48	42%
Decreasing	10	9%
Increasing	55	49%
Total	113	

Survey Participants: 135
 Question Respondents: 113
 No Response Count: 22
 Response Rate: 84%

Figure 40: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	3	2%
0%	18	15%
1 - 9%	52	42%
10 - 24%	27	22%
25 - 49%	12	10%
50 - 99%	4	3%
Over 100%	8	6%
Total	124	

Survey Participants: 135
 Question Respondents: 124
 No Response Count: 11
 Response Rate: 92%

Figure 41: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	11	9%
Staying the same	26	20%
Increasing	86	67%
Not applicable	5	4%
Total	128	

Survey Participants: 135
 Question Respondents: 128
 No Response Count: 7
 Response Rate: 95%

Figure 42: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Declining	1	1%
Staying the same	12	16%
Increasing	33	43%
Not applicable	30	39%
Total	76	

Survey Participants: 135
 Question Respondents: 76
 No Response Count: 59
 Response Rate: 56%

Figure 43: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	13	11%
Staying the same	26	23%
Increasing	71	62%
Not applicable	5	4%
Total	115	

Survey Participants: 135
 Question Respondents: 115
 No Response Count: 20
 Response Rate: 85%

Figure 44: Historical export sales trend	Count	Percent of Question Respondents
Increasing	3	3%
Not applicable	94	97%
Total	97	

Survey Participants: 135
 Question Respondents: 97
 No Response Count: 38
 Response Rate: 72%

Figure 45a: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents

0%	72	57.14%
1-9%	17	13.49%
10-19%	16	12.70%
20-29%	5	3.97%
30-39%	5	3.97%
40-49%	6	4.76%
50-59%	2	1.59%
60-69%	1	0.79%
90-99%	2	1.59%
Total	126	

Survey Participants: 135
Question Respondents: 126
No Response Count: 9
Response Rate: 93%

Figure 45b: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
0%	83	65.87%
1-9%	25	19.84%
10-19%	9	7.14%
20-29%	4	3.17%
40-49%	1	0.79%
50-59%	1	0.79%
60-69%	1	0.79%
80-89%	1	0.79%
90-99%	1	0.79%
Total	126	

Survey Participants: 135
Question Respondents: 126
No Response Count: 9
Response Rate: 93%

Figure 45c: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
0%	54	42.86%
1-9%	19	15.08%
10-19%	21	16.67%

20-29%	13	10.32%
30-39%	7	5.56%
40-49%	5	3.97%
50-59%	2	1.59%
60-69%	1	0.79%
70-79%	1	0.79%
80-89%	1	0.79%
90-99%	2	1.59%
Total	126	

Survey Participants: 135
Question Respondents: 126
No Response Count: 9
Response Rate: 93%

Figure 45d: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
0%	42	33.33%
1-9%	24	19.05%
10-19%	24	19.05%
20-29%	20	15.87%
30-39%	6	4.76%
40-49%	3	2.38%
50-59%	2	1.59%
80-89%	2	1.59%
90-99%	3	2.38%
Total	126	

Survey Participants: 135
Question Respondents: 126
No Response Count: 9
Response Rate: 93%

Figure 45e: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
0%	12	9.52%
1-9%	9	7.14%
10-19%	8	6.35%
20-29%	4	3.17%

30-39%	3	2.38%
40-49%	4	3.17%
50-59%	12	9.52%
60-69%	5	3.97%
70-79%	12	9.52%
80-89%	9	7.14%
90-99%	25	19.84%
100%	23	18.25%
Total	126	

Survey Participants: 135
 Question Respondents: 126
 No Response Count: 9
 Response Rate: 93%

Figure 45f: Source of Majority of Sales	Count	Percent of Question Respondents
Local	76	60%
Provincial	5	4%
National	6	5%
United States	3	2%
International	3	2%
Total	93	

Survey Respondents: 80

Figure 46: International trade status	Count	Percent of Question Respondents
Export	4	4%
Import	10	10%
None	56	54%
Not applicable	42	40%
Total	112	

Survey Participants: 135
 Question Respondents: 104
 No Response Count: 31
 Response Rate: 77%

Figure 47a: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
0%	49	46%
1-9%	8	7%
10-19%	11	10%
20-29%	7	7%
30-39%	3	3%
40-49%	2	2%
50-59%	4	4%
60-69%	2	2%
70-79%	3	3%
80-89%	3	3%
90-99%	5	5%
100%	10	9.35%
Total	107	

Survey Participants: 135
 Question Respondents: 107
 No Response Count: 28
 Response Rate: 79%

Figure 47b: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
0%	36	33.64%
1-9%	2	1.87%
10-19%	8	7.48%
20-29%	10	9.35%
30-39%	5	4.67%
40-49%	7	6.54%
50-59%	3	2.80%
60-69%	4	3.74%
70-79%	4	3.74%
80-89%	8	7.48%
90-99%	7	6.54%
100%	13	12.15%
Total	107	

Survey Participants: 135
 Question Respondents: 107

No Response Count: 28
 Response Rate: 79%

Figure 47c: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
0%	49	45.79%
1-9%	6	5.61%
10-19%	9	8.41%
20-29%	9	8.41%
30-39%	5	4.67%
40-49%	3	2.80%
50-59%	7	6.54%
60-69%	2	1.87%
70-79%	4	3.74%
80-89%	2	1.87%
90-99%	2	1.87%
100%	9	8.41%
Total	107	

Survey Participants: 135
 Question Respondents: 107
 No Response Count: 28
 Response Rate: 79%

Figure 47d: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
0%	81	75.70%
1-9%	4	3.74%
10-19%	8	7.48%
20-29%	5	4.67%
30-39%	1	0.93%
40-49%	1	0.93%
50-59%	5	4.67%
70-79%	1	0.93%
80-89%	1	0.93%
Total	107	

Survey Participants: 135
 Question Respondents: 107

No Response Count: 28
 Response Rate: 79%

Figure 47e: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
0%	90	84.11%
1-9%	4	3.74%
10-19%	4	3.74%
20-29%	3	2.80%
30-39%	1	0.93%
70-79%	1	0.93%
80-89%	1	0.93%
90-99%	2	1.87%
100%	1	0.93%
Total	107	

Survey Participants: 135
 Question Respondents: 107
 No Response Count: 28
 Response Rate: 79%

Figure 47f: Source of Majority of Supplies	Count	Percent of Question Respondents
Local	23	22%
Provincial	36	34%
National	19	18%
United States	2	2%
International	5	5%
Total	85	

Figure 48: Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	74	67.89%
No	35	32.11%
Total	109	

Survey Participants: 135

Question Respondents: 109
 No Response Count: 26
 Response Rate: 81%

FACILITIES AND EQUIPMENT

Figure 49: What is the square footage of your current facility?: sq./ft.	Count	Percent of Question Respondents
less than 1,000 sq. ft.	30	27%
1,000-4,999 sq. ft.	56	50%
5,000-9,999 sq. ft.	11	10%
10,000-19,999 sq. ft.	6	5%
20,000 sq. ft. or more	9	8%
Total	112	

Survey Participants: 135
 Question Respondents: 112
 No Response Count: 23
 Response Rate: 83%

Figure 50: Condition of facility	Count	Percent of Question Respondents
Excellent	31	25%
Good	63	51%
Fair	29	23%
Poor	1	1%
Total	124	

Survey Participants: 135
 Question Respondents: 124
 No Response Count: 11
 Response Rate: 92%

Figure 51: Condition of equipment	Count	Percent of Question Respondents
Excellent	50	39%
Good	63	49%

Fair	15	12%
Poor	1	1%
Total	129	

Survey Participants: 135
 Question Respondents: 129
 No Response Count: 6
 Response Rate: 96%

Figure 52a: Status of facility	Count	Percent of Question Respondents
Owned	47	37%
Leased	81	63%
Total	128	

Survey Participants: 135
 Question Respondents: 128
 No Response Count: 7
 Response Rate: 95%

Figure 53: Status of facility: If <i>Leased</i>, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	28	67%
1 - 2 Years	2	5%
3 - 5 Years	7	17%
> 5 Years	5	12%
Total	42	

Survey Participants: 135
 Question Respondents: 42
 No Response Count: 39
 Parent Question 'Leased' Respondents: 81
 Parent Question Respondents: 128
 Response Rate: 52%

Figure 54a: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	54	77%
No	16	23%
Total	70	

Survey Participants: 135
 Question Respondents: 70
 No Response Count: 65
 Response Rate: 52%

Figure 54b: Are you planning on renewing current lease?: If No, why not	Count	Percent of Question Respondents
Business expanding	1	8.33%
Business for sale	1	8.33%
Landlord issues	1	8.33%
Not sure	1	8.33%
Seeking larger building	1	8.33%
Purchasing a facility	3	25.00%
Moving to new location	4	33.33%
Total	12	

Survey Participants: 135
 Question Respondents: 12
 No Response Count: 4
 Parent Question 'No' Respondents: 16
 Parent Question Respondents: 70
 Response Rate: 75%

Figure 54c: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	37	38.14%

Own	60	61.86%
Total	97	

Survey Participants: 135
 Question Respondents: 97
 No Response Count: 38
 Response Rate: 72%

Figure 55: Historical investment trends: Over past 18 months in the <i>facility</i>	Count	Percent of Question Respondents
Declining	6	6%
Staying the same	52	51%
Increasing	44	43%
Total	102	

Survey Participants: 135
 Question Respondents: 102
 No Response Count: 33
 Response Rate: 76%

Figure 56a: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	46	36%
No	82	64%
Total	128	

Survey Participants: 135
 Question Respondents: 128
 No Response Count: 7
 Response Rate: 95%

Figure 56b: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	62	48%
No	67	52%
Total	129	

Survey Participants: 135
 Question Respondents: 129
 No Response Count: 6
 Response Rate: 96%

Figure 57: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	60	48%
No	50	40%
Maybe	16	13%
Total	126	

Survey Participants: 135
 Question Respondents: 126
 No Response Count: 9
 Response Rate: 93%

Figure 58: 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	40	67%
No	20	33%
Total	60	

Survey Participants: 135
 Question Respondents: 60
 No Response Count: 2
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129
 Response Rate: 97%

Figure 59a: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents

Yes	58	97%
No	2	3%
Total	60	

Survey Participants: 135
 Question Respondents: 60
 No Response Count: 2
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129
 Response Rate: 97%

Figure 59b: Does the company plan to expand in the next three years?: Estimated timeframe for expansion	Count	Percent of Question Respondents
< 1 Year	14	28%
1-3 Years	24	48%
> 3 Years	12	24%
Total	50	

Survey Participants: 135
 Question Respondents: 50
 No Response Count: 12
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129
 Response Rate: 81%

Figure 60: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	11	31%
\$25,000-\$99,999	7	19%
\$100,000-\$499,999	12	33%
\$500,000-\$999,999	1	3%
\$1-\$4.9 million	5	14%
Total	36	

Survey Participants: 135

Question Respondents: 36
 No Response Count: 26
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129
 Response Rate: 58%

Figure 61: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
0%	1	3%
Under 50%	14	44%
50 to 99%	6	19%
100%	11	34%
Total	32	

Survey Participants: 135
 Question Respondents: 32
 No Response Count: 30
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129
 Response Rate: 52%

Figure 62: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents
Under 50%	3	11%
50 to 99%	16	59%
100%	8	30%
Total	27	

Survey Participants: 135
 Question Respondents: 27
 No Response Count: 35

Parent Question 'Yes' 62
 Respondents:
 Parent Question 129
 Respondents:
 Response Rate: 44%

Total	37	100%
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Respondents planning to expand: 37

Figure 63: Does the company plan to expand in the next three years?: Estimated facility size increase (sq./ft.)	Count	Percent of Question Respondents
Less than 1,000 sq. ft.	8	35%
1,000 to 4,999 sq. ft.	10	43%
5,000-9,999 sq. ft.	3	13%
10,000-19,999 sq. ft.	2	9%
Total	23	

Survey Participants: 135
 Question
 Respondents: 23
 No Response Count: 39
 Parent Question 'Yes' 62
 Respondents:
 Parent Question 129
 Respondents:
 Response Rate: 37%

Figure 64: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	77	63%
No	45	37%
Total	122	

Survey Participants: 135
 Question
 Respondents: 122
 No Response Count: 13
 Response Rate: 90%

Figure 64: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	12	15.79%
6	19	25.00%
12	18	23.68%
18	8	10.53%
24	9	11.84%
36	10	13.16%
Total	76	

Survey Participants: 135
 Question Respondents: 76
 No Response Count: 1
 Parent Question 'Yes' Respondents: 77
 Parent Question Respondents: 122
 Response Rate: 99%

Figure 65a: Planning any upgrades to the facility?	Count	Percent of Question Respondents
Yes	54	46%
No	63	54%
Total	117	

Survey Participants: 135
 Question Respondents: 117
 No Response Count: 18
 Response Rate: 87%

Figure 65b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	15	29%
6	15	29%
12	11	21%
18	1	2%

24	9	17%
36	1	2%
Total	52	

Survey Participants: 135
 Question Respondents: 52
 No Response Count: 2
 Parent Question 'Yes' Respondents: 54
 Parent Question Respondents: 117
 Response Rate: 96%

Figure 66a: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Business capacity	1	4.76%
Change in ownership	1	4.76%
Infrastructure limitations	1	4.76%
Lack of suitable premises	1	4.76%
Permits	1	4.76%
Taxes	1	4.76%
Water supply	1	4.76%
Zoning bylaws	1	4.76%
Affordable commercial space	2	9.52%
Building code restrictions	2	9.52%
Lease issues	3	14.29%
Financing	5	23.81%
None	4	19.05%
Total	24	

Survey Participants: 135
 Question Respondents: 21
 No Response Count: 42
 Parent Question 'No' Respondents: 63

Parent Question Respondents: 117
 Response Rate: 33%

Figure 66b: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Energy reliability	3	3%
Warehousing	3	3%
Roads	5	6%
Energy costs	6	7%
Identifying and accessing new markets	7	8%
Other (please specify):	9	10%
Problems with DAs	9	10%
Broadband access	10	12%
Transport/freight	10	12%
Lack of skilled staff	13	15%
Local regulations e.g. zoning	14	16%
Lack of suitable premises	16	19%
Finance	32	37%
Total	137	

Survey Participants: 135
 Question Respondents: 86
 No Response Count: 0
 Parent Question 'Yes' Respondents: 62
 Parent Question Respondents: 129

Figure 66c: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents

Demand for service / product	1	7%
Experience and dedication	1	7%
Lack of suitable airport	1	7%
Landlord Issues	1	7%
Language	1	7%
Organizational Capacity	1	7%
Personal Preference	1	7%
Retirement	1	7%
Skilled labour supply	1	7%
Staffing	1	7%
Water	1	7%
Lack of Suitable Premises	2	14%
Time	2	14%
Total	15	

Survey Participants: 135
Question Respondents: 14
No Response Count: 1

Figure 67a: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	26	34%
No	50	66%
Total	76	

Survey Participants: 135
Question Respondents: 76
No Response Count: 59
Response Rate: 56%

Figure 67b: If Yes, which have you approached?	Count	Percent of Question Respondents
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BC Ministry responsible for Economic Development	3	19%
Local Council	3	19%
Community Futures	5	31%
Local Economic Development Office	5	31%
Other (please specify):	7	44%
Total	23	

Survey Participants: 135
 Question Respondents: 16
 No Response Count: 10
 Parent Question 'Yes' Respondents: 26
 Parent Question Respondents: 76
 Response Rate: 62%

Figure 67c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
BC Transportation	1	6.25%
Banks / Credit unions	1	6.25%
MLA	1	6.25%
Okanagan College	1	6.25%
Province of British Columbia	2	12.50%
Total	6	

Survey Participants: 135
 Question Respondents: 6
 No Response Count: 1
 Parent Question 'Other' Respondents: 7
 Parent Question Respondents: 16
 Response Rate: 86%

Figure 68: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	77	71%
No	31	29%
Total	108	

Survey Participants: 135
 Question Respondents: 108
 No Response Count: 27
 Response Rate: 80%

GOVERNMENT SERVICES

Figure 69a: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	97	84%	8	7%	6	5%	4	3%	0	0%	115
Access to US Border	78	64%	17	14%	10	8%	15	12%	2	2%	122
Access to airport facilities	56	44%	43	34%	11	9%	13	10%	3	2%	126
Access to highway/ roads	5	4%	21	16%	33	25%	55	42%	16	12%	130
Access to markets	5	4%	9	7%	31	24%	67	52%	18	14%	130
Access to suppliers	11	9%	24	19%	36	28%	45	35%	13	10%	129
Availability of appropriately zoned land	61	53%	15	13%	21	18%	18	16%	0	0%	115
Availability of buildings for lease or purchase	44	37%	20	17%	29	24%	26	22%	1	1%	120
Availability of rail transport	99	80%	14	11%	3	2%	6	5%	1	1%	123
Availability of road transport services	9	7%	17	13%	41	32%	50	39%	11	9%	128
Availability of warehousing	85	68%	11	9%	9	7%	18	14%	2	2%	125
Development approval process	56	48%	17	15%	25	21%	17	15%	2	2%	117
Disposal of waste material	20	16%	17	14%	20	16%	57	46%	11	9%	125
Inspections /licensing	17	14%	11	9%	31	25%	52	43%	11	9%	122
Recycling	9	7%	30	24%	29	23%	50	39%	9	7%	127
Telecommunications (internet, cell)	1	1%	41	32%	40	32%	39	31%	6	5%	127
Water and sewerage supply	20	16%	16	13%	10	8%	60	49%	17	14%	123

Survey Participants:

135

Figure 69b: Please rate the following: Other (please specify)	Please rate the following: Other (please specify)	Count	Percent of Question Respondents
BCSA	Poor	1	2.17%
Canada Post	Poor	1	2.17%
Canadian Revenue Agency	Poor	1	2.17%
Federal- Employment and Migration	Poor	1	2.17%
Front Counter BC	Poor	1	2.17%
Highway Maintenance	Poor	1	2.17%
International workers program	Poor	1	2.17%
ROE Online	Excellent	1	2.17%
Resort Development Branch-Provincial Government	Good	1	2.17%
Service Canada	Poor	6	13.04%
Snow Removal	Poor	2	4.35%
Work BC	Good	2	4.35%
Total		19	41.30%

Survey Participants: 135

Question Respondents: 46

No Response Count: 89

Response Rate: 34%

Figure 70a: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	97	76.38%
No	30	23.62%
Total	127	

Survey Participants: 135

Question Respondents: 127

No Response Count: 8

Response Rate: 94%

Figure 70b: Do you have any suggestions on how to improve any of the services and infrastructure listed above? If Yes,	Count	Percent of Question Respondents

how?		
Build and develop the city for potential growth	1	1.04%
Consider more and proper signage	1	1.04%
Develop a long term vision for the community	1	1.04%
Encourage apprenticeship program in the schools	1	1.04%
Improve sewage and waste water management	1	1.04%
Increase educational services	1	1.04%
Less power outages	1	1.04%
More support for tourism	1	1.04%
Snow removal	2	2.08%
Access to information	3	3.12%
Address land zoning issues	3	3.12%
Bring down cost of commercial buildings	3	3.12%
Improve city employee training	3	3.12%
Restructure taxes	4	4.17%
Increase attention to community and business needs	5	5.21%
Increase airport services	6	6.25%
Streamline development approval processes	7	7.29%
Provide a cost effective shipping and receiving service	10	10.42%
Improve recycling and waste management	18	18.75%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	24	25.00%
Improve highway and road quality and service	31	32.29%
Total	127	

Survey Participants: 135
 Question Respondents: 96
 No Response Count: 1
 Parent Question 'Yes' Respondents: 97
 Parent Question Respondents: 127
 Response Rate: 99%

Figure 71: Which airport services do you use?	Count	Percent of Question Respondents
Bellingham	1	1%
Castlegar	1	1%
Revelstoke	1	1%
Seattle	1	1%
Springbank	1	1%
Kamloops	9	7%
Vancouver	10	8%
Calgary	50	40%
Kelowna	112	90%
Total	186	

Survey Participants: 135

Question Respondents: 125

No Response Count: 10

Response Rate: 93%

Figure 72: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Charter service	1	1%
Commercial flights	1	1%
Courier service	1	1%
Hanger facilities	1	1%
More airlines	1	1%
Parking	1	1%
More flights	2	2%
Improvements to navigational aids	3	3%
Tourism services	3	3%
Extended runway	4	4%
Larger aircraft	5	5%
Shuttle service	7	6%
Passenger service	10	9%
Commuter flights	18	17%
Regular flights	27	25%
Total	85	

Survey Participants: 135

Question Respondents: 108

No Response Count: 27

Response Rate: 80%

BUSINESS CLIMATE

Figure 74: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
BIA	67	74%	1	1%	0	0%	14	16%	8	9%	90
Chamber of Commerce	20	16%	4	3%	19	15%	58	46%	25	20%	126
Colleges/Universities	24	19%	32	25%	40	32%	27	21%	3	2%	126
Community Futures	34	28%	7	6%	10	8%	47	39%	22	18%	120
Cultural/Recreational Amenities	0	0%	1	1%	18	14%	54	42%	57	44%	130
Economic Development	16	13%	22	17%	41	32%	43	34%	5	4%	127
Housing	6	5%	48	37%	50	38%	27	21%	0	0%	131
K-12 education	26	21%	7	6%	4	3%	56	44%	33	26%	126
Local Government	11	9%	16	13%	35	28%	60	48%	4	3%	126
Local Tax Structure	21	16%	58	45%	37	28%	13	10%	1	1%	130
Technical Training	43	35%	42	34%	28	23%	8	7%	1	1%	122
Tourism services	10	8%	1	1%	9	7%	81	63%	28	22%	129
Workforce Availability	2	2%	25	19%	57	44%	38	29%	8	6%	130
Workforce Quality	1	1%	8	6%	49	38%	55	43%	16	12%	129
Workforce Stability	2	2%	30	23%	56	43%	36	28%	6	5%	130

Survey Participants: 135

Figure75a: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	61	50%
No change	24	20%
Worse today	14	11%
No opinion	23	19%
Total	122	

Survey Participants: 135

Question Respondents: 122

No Response Count: 13

Response Rate: 90%

Figure 75b: Please compare the local business climate today versus 5 years ago: If worse today, why?	Count	Percent of Question Respondents
Businesses failures	1	9%
Decline in cultural events	1	9%
Decline in tourism based events	1	9%
Decrease in provincial and federal funding	1	9%
Expensive commercial real estate	1	9%
Financial insecurity	1	9%
Forestry downturn	1	9%
Higher taxes	1	9%
Lack of affordable accommodation	1	9%
Lack of business diversification	1	9%
Out of date by-laws and permits	1	9%
Overhead businesses costs	1	9%
Previous council	1	9%
More competition	2	18%
Total	15	

Survey Participants: 135

Question Respondents: 11
 No Response Count: 3
 Parent Question 'Worse today' Respondents: 14
 Parent Question Respondents: 122
 Response Rate: 79%

Figure 76: 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	96	76%
No change	24	19%
Will be worse	3	2%
No opinion	4	3%
Total	127	

Survey Participants: 135
 Question Respondents: 127
 No Response Count: 8
 Response Rate: 94%

Figure 77: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Great place to live	1	1%
Progressive	1	1%
Quality of life	1	1%
Self-reliant	1	1%
Environment	2	2%
Skilled workforce	2	2%
Growth potential	3	2%
Low competition	3	2%
Vibrant downtown	3	2%
Chamber of Commerce	4	3%
Outdoor activities	4	3%
Good demographics	5	4%
Industry diversity	5	4%
Small town	10	8%
Social network	11	9%
Tourism	11	9%

Recreational opportunities	12	9%
Location	14	11%
Customer loyalty	17	13%
Friendliness	17	13%
Lifestyle	25	20%
Strong sense of community	27	21%
Total	179	

Survey Participants: 135

Question Respondents: 128

No Response Count: 7

Response Rate: 95%

Figure 78: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Divided community (industry vs. tourism)	1	1%
Competition	3	2%
Cost of doing business	4	3%
Planning and development process	4	3%
Transient population	4	3%
Resistance to change	5	4%
Internet access	6	5%
Low average income	6	5%
Seasonality	7	5%
Weather	7	5%
Access to skilled labour	8	6%
Lack of local services	9	7%
Development Constraints (Zoning/Bureaucracy/Permits)	12	9%
Zoning	13	10%
Poor road conditions	14	11%
Shipping and Receiving costs	15	12%
Tax structure	15	12%
Population (size/growth/aging)	16	13%

High cost of living	21	16%
Location	40	31%
Total	210	

Survey Participants: 135
 Question Respondents: 128
 No Response Count: 7
 Response Rate: 95%

Figure 79a: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	114	90%
No	12	10%
Total	126	

Survey Participants: 135
 Question Respondents: 126
 No Response Count: 9
 Response Rate: 93%

Figure 79b: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Low economic diversification	2	2%
Weather	2	2%
Affordable housing	3	3%
Resistance to change	3	3%
Cost of doing business	4	4%
Shipping costs	4	4%
Zoning	4	4%
Internet access	5	5%
Seasonality	5	5%
Skilled labour	5	5%
Cost of living	8	7%
Low income levels	8	7%
Poor road conditions	10	9%
Tax structure	11	10%
Development approval process	16	14%
Low population	24	22%
Isolated location	26	23%
Total	140	

Survey Participants: 135
 Question Respondents: 111
 No Response Count: 3
 Parent Question 'Yes' Respondents: 114
 Parent Question Respondents: 126
 Response Rate: 97%

Figure 80a: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	26	22%
No	92	78%
Total	118	

Survey Participants: 135
 Question Respondents: 118
 No Response Count: 17
 Response Rate: 87%

Figure 80b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Federal agency or department	1	4%
Freight company	1	4%
High Tech Companies	1	4%
Kentucky Fried Chicken	1	4%
Landscape architects	1	4%
Local theatre	1	4%
Skilled labour	1	4%
Tree nursery	1	4%
Wholesalers	1	4%
Wine and cheese shop	1	4%
Building supplies	2	9%
Courier service	2	9%
Data center	2	9%
Local artisans	2	9%
Meats & Dairy / Fruits and Vegetables / Grains	2	9%

Retail stores	4	17%
Total	24	

Survey Participants: 135
 Question Respondents: 23
 No Response Count: 3
 Parent Question 'Yes' Respondents: 26
 Parent Question Respondents: 118
 Response Rate: 88%

Figure 81: Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	74	68%
No	35	32%
Total	109	

Survey Participants: 135
 Question Respondents: 109
 No Response Count: 26
 Response Rate: 81%

Figure 82a: What sectors, business or industry do you think the community should try to attract?	Count	Percent of Question Respondents
Yes	116	94%
No	8	6%
Total	124	

Survey Participants: 135
 Question Respondents: 124
 No Response Count: 11
 Response Rate: 92%

Figure 82b: What sectors, business or industry do you think the community should try to attract?: If Yes, please list	Count	Percent of Question Respondents
Agriculture	1	1%
Bio energy	1	1%
Car rental	1	1%

Car wash	1	1%
Child Care services	1	1%
Climbing Gym	1	1%
Dry Cleaner	1	1%
Golf Course	1	1%
Highway Service Centre	1	1%
Snow mobiling	1	1%
Airport services	2	2%
Climbing gym	2	2%
Medium security penitentiary	2	2%
Recycling Services	2	2%
Arts & Culture	3	3%
Commercial contractors	3	3%
Shipping companies	3	3%
Mountain biking	4	3%
Educational services	5	4%
Green Businesses	5	4%
Grocery stores	5	4%
Professional Services	5	4%
Hospitality	8	7%
Restaurants	9	8%
Manufacturing	15	13%
Retail stores	18	16%
Tourism	23	20%
Technology businesses	27	23%
Total	151	

Survey Participants: 135

Question Respondents: 116

No Response Count: 0

Parent Question 'Yes' Respondents: 116

Parent Question Respondents: 124

Response Rate: 100%

ASSESSMENT AND PLANS

Figure 83: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	24	18%
Good	84	64%
Fair	20	15%
Poor	3	2%
Not applicable	1	1%
Total	132	

Survey Participants: 135
 Question Respondents: 132
 No Response Count: 3
 Response Rate: 98%

Figure 84: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	17	23%
Good	19	26%
Fair	4	5%
Not applicable	34	46%
Total	74	

Survey Participants: 135
 Question Respondents: 74
 No Response Count: 61
 Response Rate: 55%

Figure 85: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	70	53%
Good	53	40%
Fair	7	5%

Poor	2	2%
Total	132	

Survey Participants: 135
 Question Respondents: 132
 No Response Count: 3
 Response Rate: 98%

Figure 86: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	11	15%
Good	27	36%
Fair	4	5%
Not applicable	32	43%
Total	74	

Survey Participants: 135
 Question Respondents: 74
 No Response Count: 61
 Response Rate: 55%

Figure 87: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
High	5	4%
Moderate	12	9%
Low	116	87%
Total	133	

Survey Participants: 135
 Question Respondents: 133
 No Response Count: 2
 Response Rate: 99%

Figure 88: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	3	2%
Moderate	12	9%
Low	116	89%

Total	131	
Survey Participants:	135	
Question Respondents:	131	
No Response Count:	4	
Response Rate:	97%	