COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON SLOCAN VALLEY BUSINESSES
(Including the municipalities of New Denver, Silverton and Slocan, and Area H of the Regional District of Central Kootenay)

WINTER 2013

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

The result of a partnership between the Regional District of Central Kootenay Area H and its three municipalities: New Denver, Silverton and Slocan, the Slocan Valley Economic Development Commission (SVEDC) supports the efforts and vision of the people of the Slocan Valley by leading and facilitating community priorities for community economic development.

The Slocan District Chamber of Commerce strives for a vibrant, diverse and healthy economy that respects the environment and community values of the Slocan Lake district including the communities of Lemon Creek, Slocan City, Red Mountain Road, Silverton, New Denver, Sandon, Rosebery, Hills and Summit Lake.

Executive Summary

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 79 businesses in the Slocan Valley in 2013. 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 respondent businesses are classified as 'Retail and Wholesale Trade' under the North American Industry Classification system, followed by manufacturing.
	Almost half (48%) of companies have been in business for more than 10 years
	22% of businesses reported a pending ownership change. Three businesses plan to transfer ownership within the next 2 years.
Local Workforce	Respondents reported a total of 409 employees, almost half are full-time
	20% of businesses expect the size of their full-time workforce to increase over the next 3 years and 44% expect it will stay the same
	Issue of lack of full time or year-round work was an important issue for many businesses/ employees
Sales	34% of businesses expect that their sales will grow by between 10 and 24% over the next year
	73% of businesses make the majority of their sales to local customers
	51% of businesses source the majority of supplies from Canadian businesses located outside of the region
Facilities and Equipment	78% of businesses own the facility in which they operate
	Almost half of businesses plan to expand within 3 years with a total estimated expansion budget of over $6.6 million
	Top barriers to expansion are financing, identifying and accessing new markets, lack of suitable premises and local regulations
Government Services	Top rated government services include access to highways/ roads, and recycling. The lowest rated services include access to airport facilities and telecommunications
	Telecommunications, and waste management are the government services most in need of improvement
Business Climate	Business climate factors that received the highest ratings include K-12 education and cultural / recreational amenities
	Businesses most commonly listed the Slocan Valley's loyal customers, stable population and beautiful environment as its greatest strengths as a place to do business
	The business competitiveness factors that are most important to respondents include improvement of customer services, new market development, workforce skill development and availability of telecommunications infrastructure and services
Assessment and Plans	13% of businesses rated the overall health of their company as excellent, 38% rated it as good
	Most businesses are at low risk of closing (75%) or downsizing (68%)

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 direct follow-up support. Research findings suggest that the following action areas have the greatest potential to improve the business climate:

Business Expansion

Nine businesses in the region are planning significant investment in expansion over the next three years. Results suggest that businesses could benefit from expansion assistance and, in particular, specific support targeted at real estate and land use. Actions on this theme could involve assisting businesses in locating potential expansion sites.

Training

Key training areas most often listed by businesses include business/ management and accounting, marketing/ sales, and first aid/ safety. Training may be best received if it is adaptive, flexible and, in some cases, subsidized. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Workforce Recruitment and Retention

A strong majority of respondents acknowledged that expansion of the workforce is important to their company's competitiveness. Providing recruitment and retention support to businesses may help improve the Slocan Valley's economic climate. Employers should consider expanding recruitment efforts beyond those currently utilized which focus on word of mouth, local media and help wanted signs to attempt to recruit workers from further afield.

Succession and Business Planning

Survey results 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, a more targeted, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to 'at-risk' businesses.

Infrastructure and Transportation

Lack of infrastructure such as telecommunications, sewer, waste disposal and transportation services was repeatedly cited as a barrier to new business development or regional growth. Actions on this theme could include support for more research in partnership with local governments, communities, service organizations and neighbouring communities into the development of telecommunications and transportation infrastructure and services in the Slocan Valley.

Attitudes Towards Growth

A perceived resistance to change or growth among residents was among the most commonly cited barriers to new business development or growth. Hosting a forum focused on planning for growth and infrastructure development could help to engage community members in the process of visioning for future growth and development.

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Project Overview

This report describes findings from a Business Retention and Expansion (BRE) survey[1] conducted in the Slocan Valley between June and September of 2013. The Slocan Valley Economic Development Commission (SVEDC) led the BRE process and partnered with the Slocan District Chamber of Commerce partnered to launch it and pull together a local steering committee and assigning two researchers and a team lead to carry out the project. The local steering committee consists of Chamber directors, SVEDC representatives and local village councillors. 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 Slocan Valley BRE project were as follows:

1. To strengthen the relationship between the community and its businesses.
2. To identify and provide follow-up support to businesses who are positioned to expand or are at risk for closure.
3. To develop data-supported recommendations regarding important future focus areas for strengthening the area's business climate.

Research Considerations

The BRE Survey

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

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

The base BRE Long Survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. A 30 question BRE Short Survey was developed for use with some businesses as many of the questions on the Long Survey were not applicable to them. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey. Seventy-six of the 79 respondent businesses completed these 13 additional questions.

The Data Set

To generate an initial set of potential research participants, researchers developed a list of economic sectors in the Slocan Valley and used local knowledge and reviewed phone books and local advertising to create a list of businesses that fell into each category. To reach out to more local businesses two press releases about the project were published in local newspapers and posters were put up in each community to recruit prospective survey participants. A cross-section of businesses were selected based on size (small, medium, large) and sector (according to the NAICS system).

Over one hundred and fifteen businesses were invited to participate through in-person meetings or telephone conversations. In total, 79 of the businesses contacted were surveyed for this project (66% response rate), including Slocan Valley businesses that participated in the Kootenay Association for Science and Technology and Kootenay Rockies Innovation Council (KRIC) data acquired through the manufacturing and technology sector specific BRE project. It is important to note that 55 participant businesses elected to do the BRE Long Survey, the questions that do not appear on the short survey are identified in the research findings.

Data Collection

Data were collected by researchers, using structured interviews that lasted approximately one hour. The process in total took approximately four hours per business, including setting up interviews, the interview itself, and data input.

Data Input, Analysis and Reporting

Data were entered into the ExecutivePulse system by researchers during and immediately following the interviews. To ensure confidentiality and data security, company-level data were only made accessible to RDI staff and the research team.

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

RESEARCH FINDINGS

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represented a diverse cross-section of industries. Most common were Retail and Wholesale Trade (23% of businesses) and Manufacturing (22%).

Figure 1: Industry classification

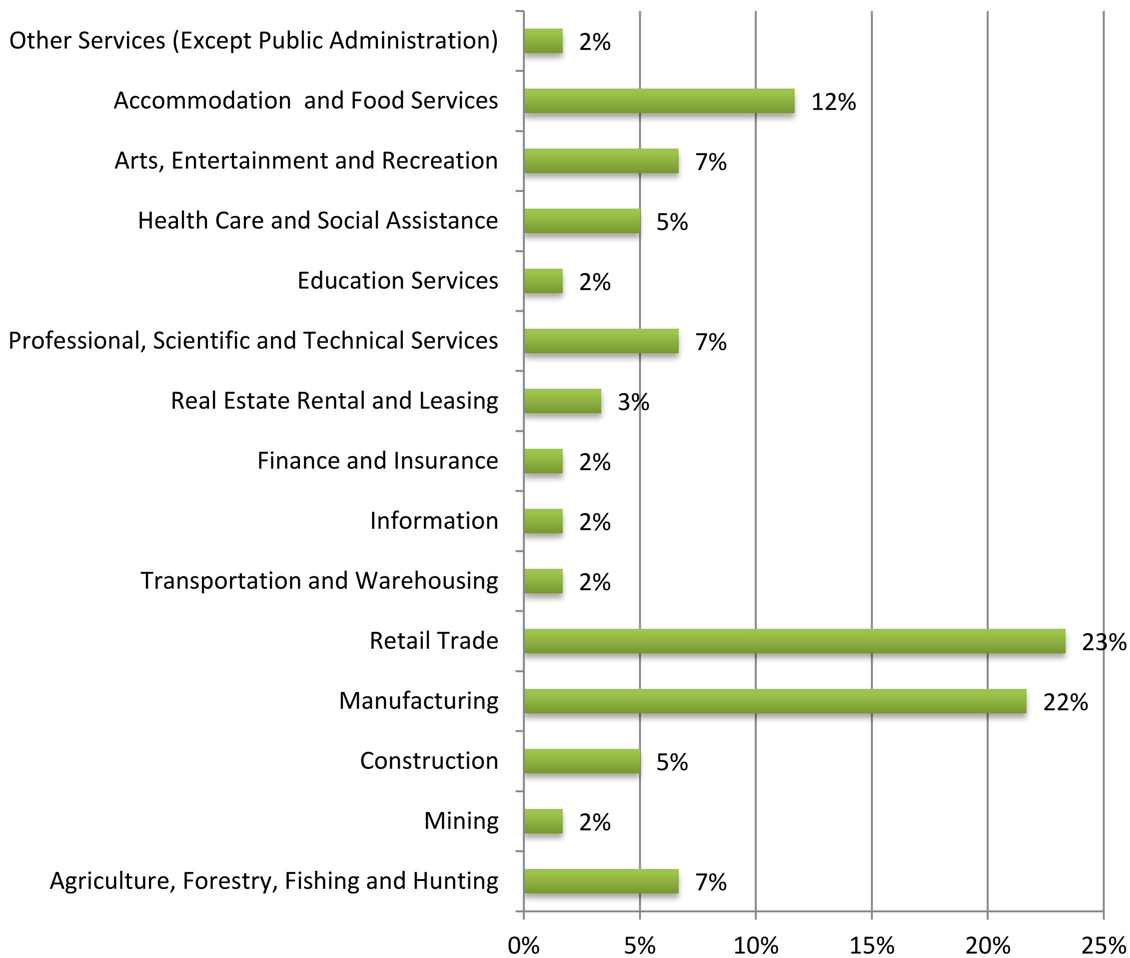


Figure 1 percentages are out of 60 respondent businesses that provided their NAICS Code

Twenty seven businesses provided details about the function of their facilities. A majority of respondents (38%) indicated that their facility provides a service; other main functions included manufacturing (22%) and distribution (20%).

Figure 2: Facility function(s)

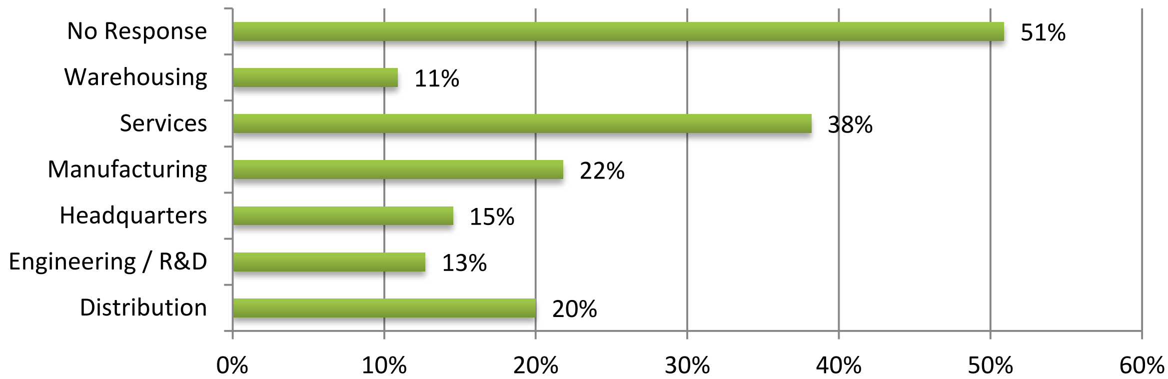


Figure 2 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Competition

Fifty-one percent of the 37 businesses who responded to this question reported that their primary competitors are located within the region. Notably, 14% indicated that they do not have any direct competition.

Figure 3: Location of primary competitors

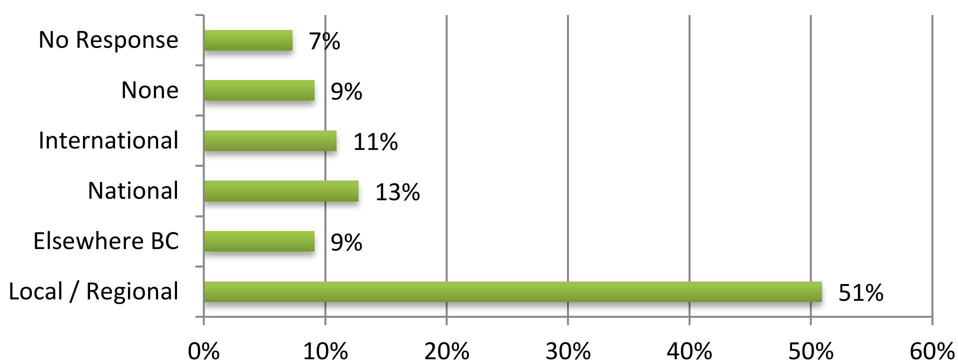


Figure 3 percentages are out of 55 respondent businesses that completed the BRE Long Survey

When asked what factors made their company successful in this region, the highest number of respondents who gave a reason cited cited quality of products and selection or the innovative nature of their products (17). Location and proximity to markets (14 respondents) and reputation, customer service and referrals (10 respondents) were also discussed often. It is important to note that 15 respondents answered "none" or did not respond to this question.

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

"Longevity and repeat customer: been in business for over 30 years in the area."

"[Our] values, stable work force and community presence."

"Variety of inventory."

Eleven percent of respondents indicated that their company has another similar location in Canada and 2% indicated that their company has another similar location in another country.

Figure 5: Other similar locations

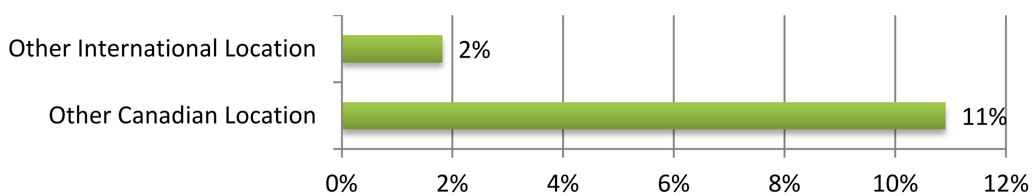


Figure 5 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Age and Life Cycle Stage

Almost half of respondents (46%) reported that their business is in the 'growing' life cycle stage. Another 30% indicated that their business is in the 'maturing' stage. Fewer respondents (14% and 8%) indicated that they are in the 'emerging' and 'declining' stages, respectively.

Figure 6: Life cycle stage

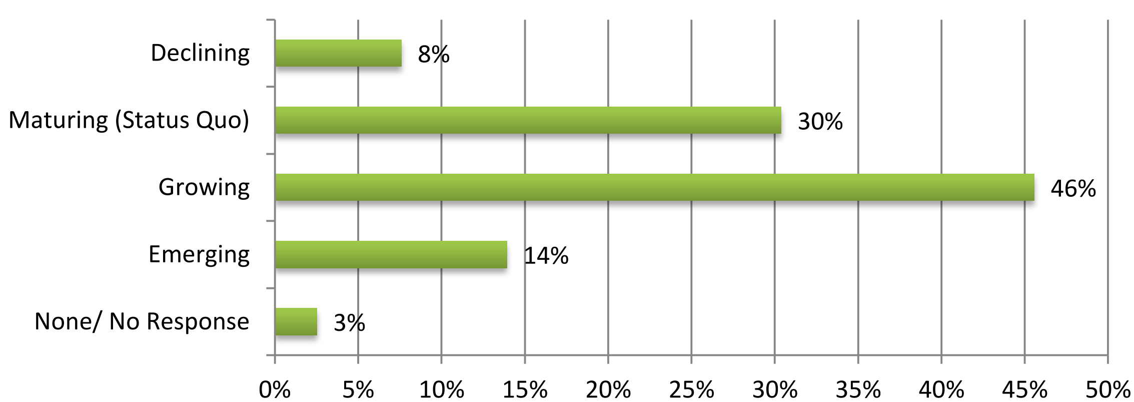


Figure 6 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Thirty-two percent of respondents reported that they have been in business for more than 20 years. Four percent indicated that they have been in business for less than 1 year.

Figure 7: Length of time in business

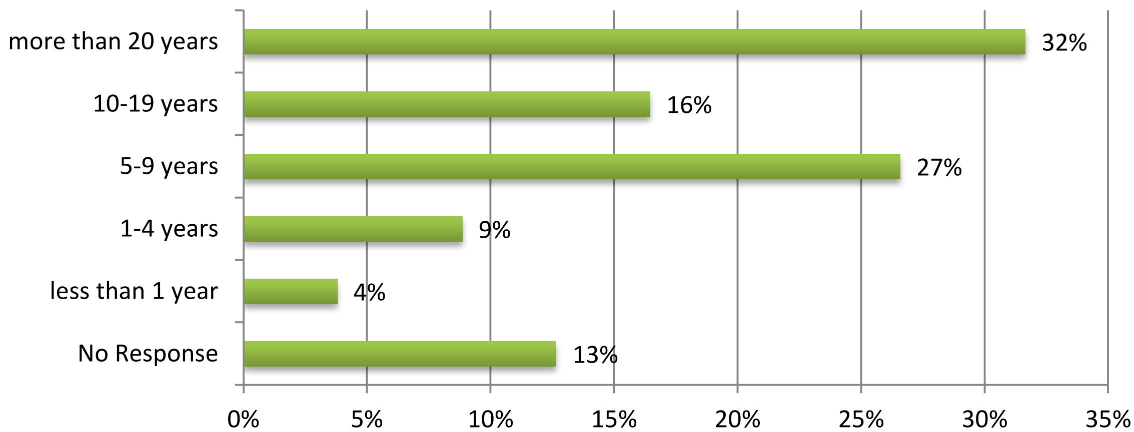


Figure 7 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Ownership and Management

Thirty-seven percent of respondents indicated that their business is classified as a corporation, while 34% indicated that they are a sole proprietorship. The remainder of businesses are partnerships (16%), other (6%), non-profits (4%) or limited liability partnerships (1%).

Figure 8: Type of business

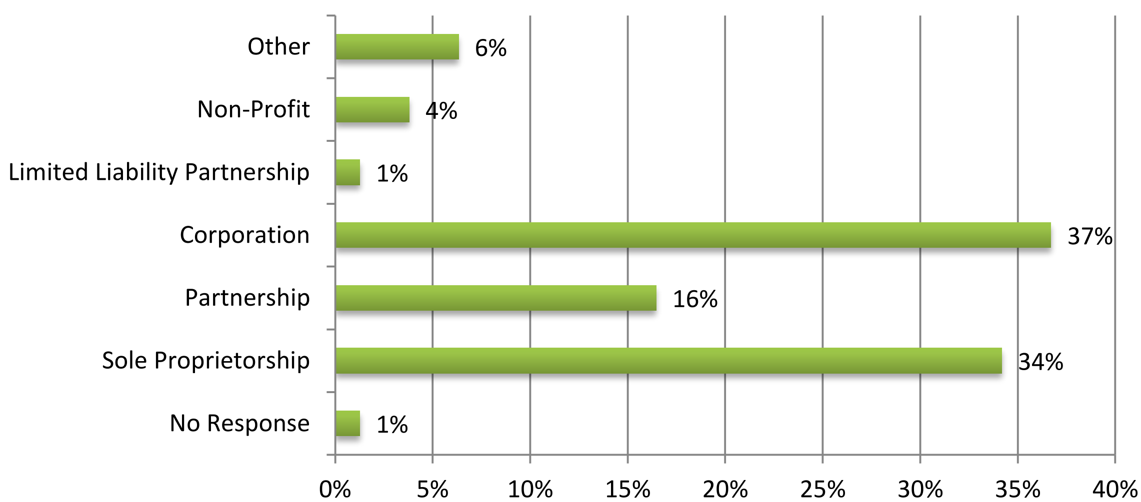


Figure 8 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Twenty-two percent of respondents reported that their headquarters are located in British Columbia and 5% indicated that they are headquartered elsewhere in Canada. 73% of businesses who completed the BRE Long Survey did not answer this question.

Figure 9: Location of headquarters

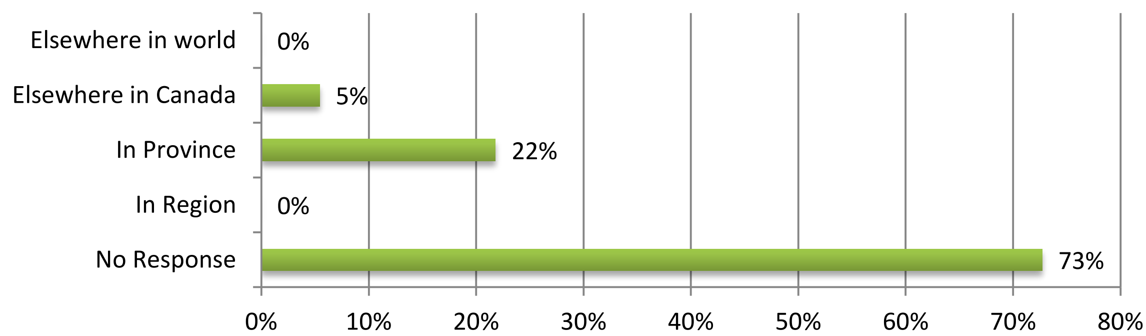


Figure 9 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Twenty-two percent of respondent businesses who completed the BRE Long or Short Survey have an ownership change pending. 16% have seen a management change in the last 5 years, and 13% have seen an ownership change. Of the nine respondents that have seen a recent management change, 78% reported that the change has had a positive impact. Of the seven respondents that have seen an ownership change, 71% reported that the change has had a positive impact.

Figure 10: Ownership and management changes in last 5 years

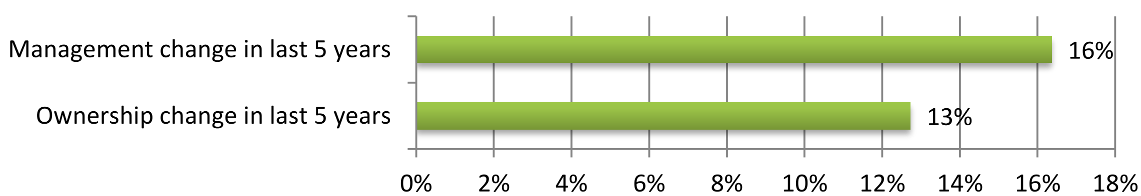


Figure 10 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Succession and Business Plans

Of the seventeen businesses that reported a pending ownership change, 71% expect the change will occur in three years or more, 18% expect it to happen in two years and 12% expect it within one year.

Figure 11: Anticipated timeline for ownership change

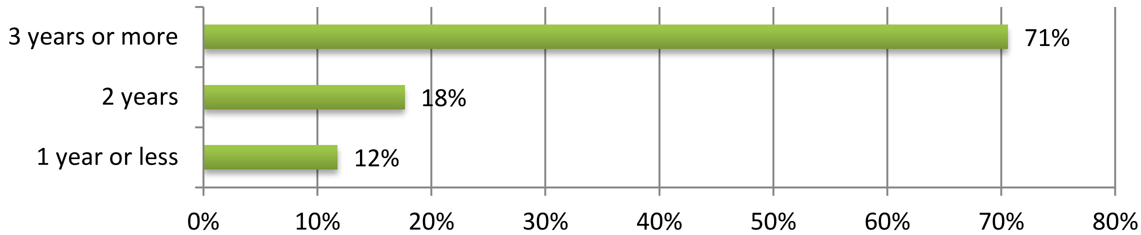


Figure 11 percentages are out of 17 respondents that reported a pending ownership change completed

Fifty-nine percent of respondents with a pending ownership change expect that the current owner will exit the business by selling it to a non-family individual, 18% expect it will be sold or transferred to another company and 6% expect that the business will pass to another family member.

Figure 12: Anticipated exit strategy

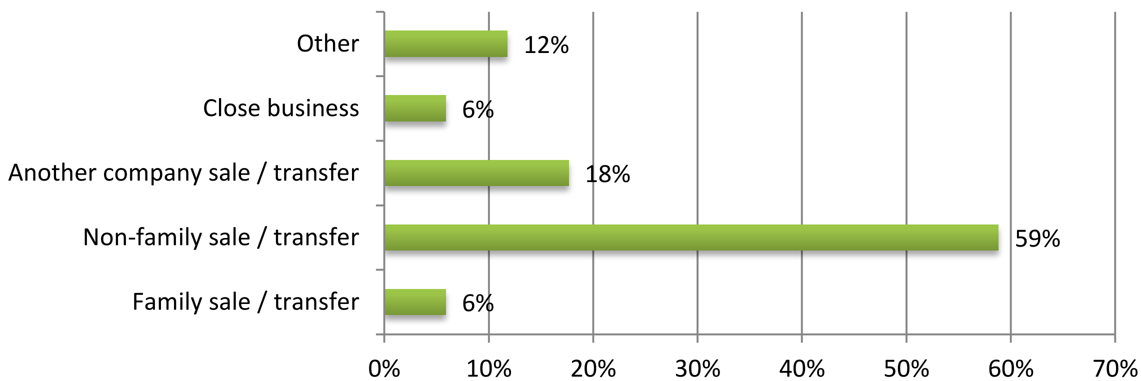
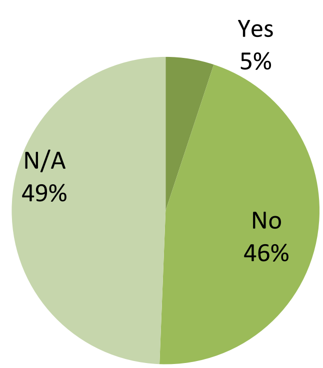


Figure 12 percentages are out of 17 respondents that reported a pending ownership change completed

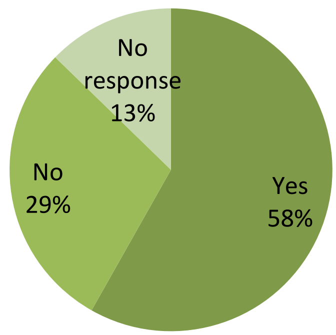
Figure 13: Existence of formal succession plan



Four percent of respondents reported that they have identified a successor and 5% reported that they have a formal succession plan in place.

Figure 13 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Figure 14: Existence of current business plan



Fifty-eight percent of businesses who completed the BRE Long Survey reported that they have a current business plan in place.

Figure 14 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Local Workforce

Size of Workforce

The 79 businesses interviewed reported a total 409 employees. Thirty-seven percent indicated that they have less than five employees and 4% indicated that they have over 20 but less than 50 employees.

Figure 15: Total number of employees

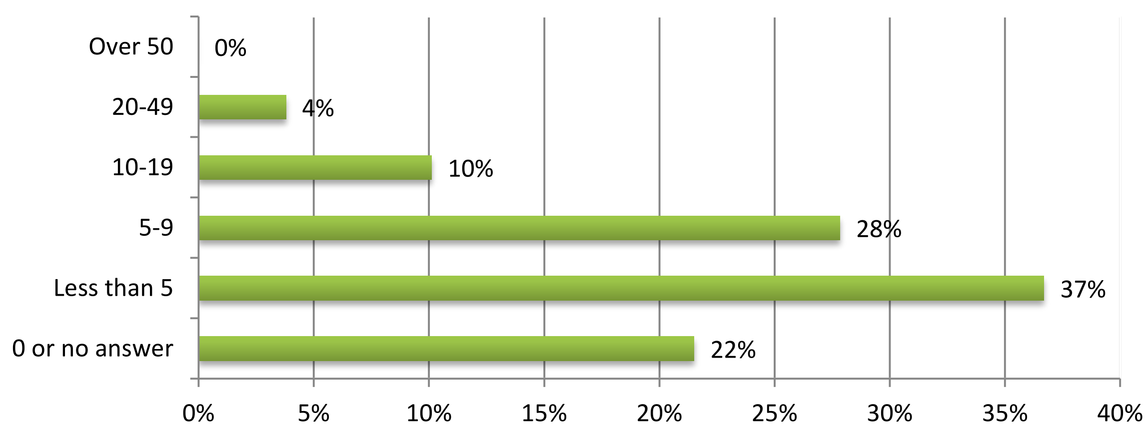


Figure 15 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Forty-four percent of positions at surveyed business are full-time, 33 % are part-time and 22% are temporary.

Figure 16: Nature of employment

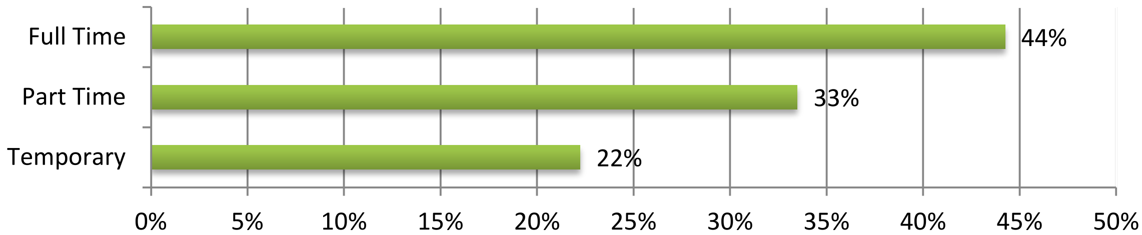


Figure 16 percentages are out of the 409 total employees reported by respondent businesses that completed the BRE Long or Short Survey

Twenty-four percent of respondents indicated that the number of employees at their business has increased over the past 10 years. Another 29% indicated that the size of their workforce has remained relatively stable.

Figure 17: Employment trend over last 10 years

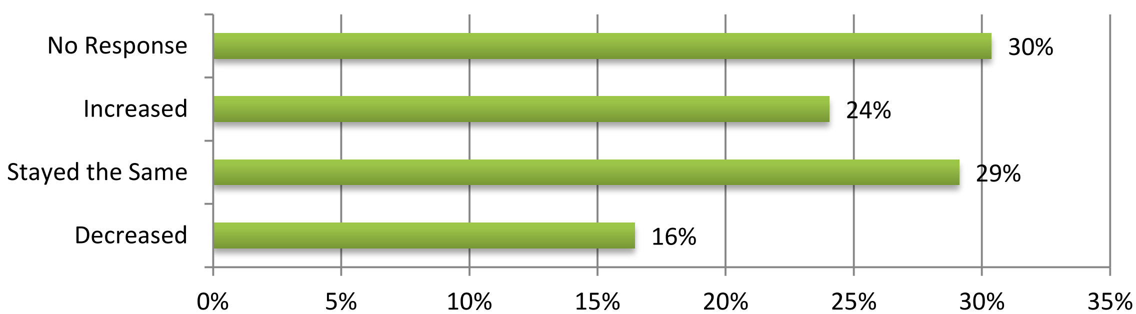


Figure 17 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

In general, data indicated that businesses expect to see small or moderate growth in the size of their workforce over the next 3 years.

Figure 18: Projected number of employees in 3 years

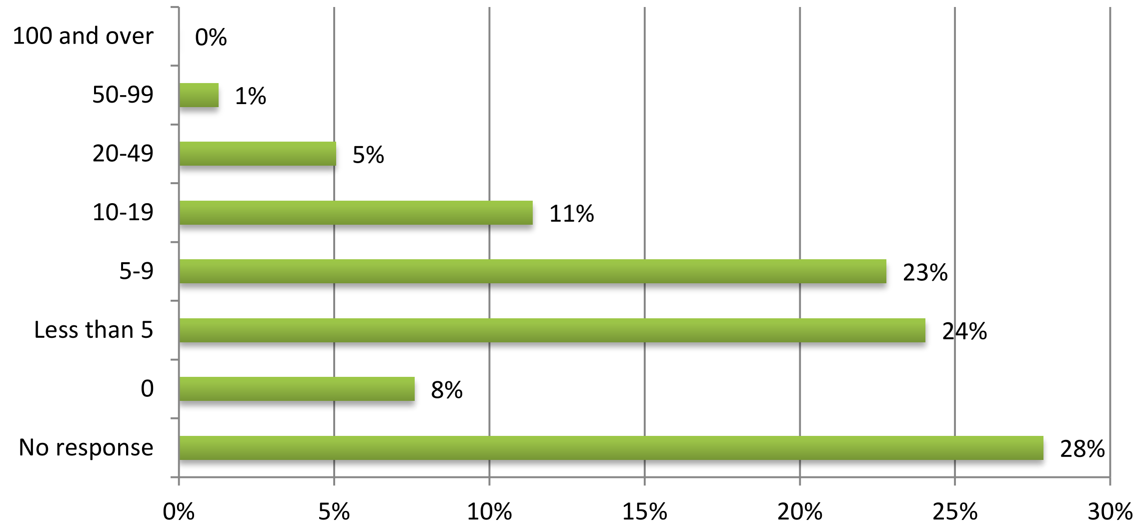


Figure 18 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Most BRE Long Survey respondents (47%) indicated that the size of their full-time workforce has remained relatively constant over the past 3 years. Another 22% indicated that it has increased.

Figure 19: Full-time employment trend over last 3 years

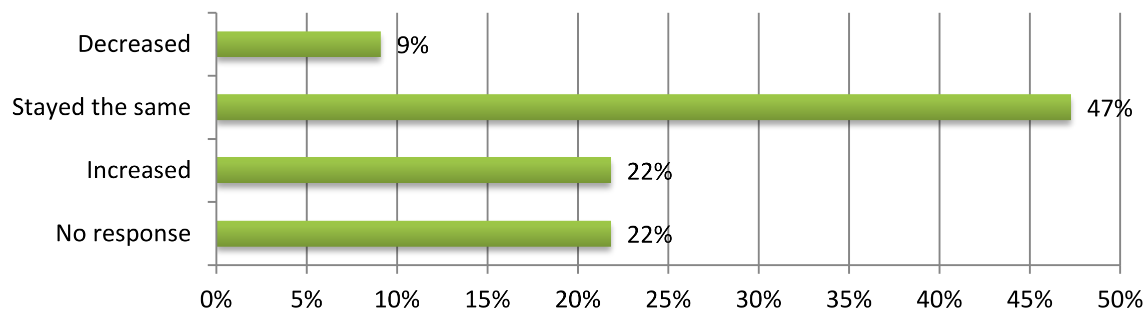


Figure 19 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Forty-four percent of businesses interviewed expect the size of their full-time workforce to stay the same size over the next 3 years while another 20% expect it to increase.

Figure 20: Full time employment trend over next 3 years

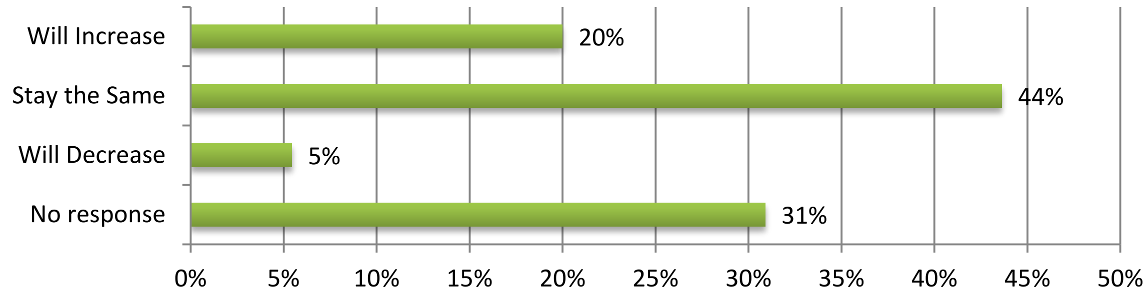


Figure 20 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Workforce Deomographics

Thirty-five percent of businesses indicated that the majority of their essential employees are between 35 and 49 years old and 28% said they were fifty or older.

Figure 21: Age of the majority of essential employees

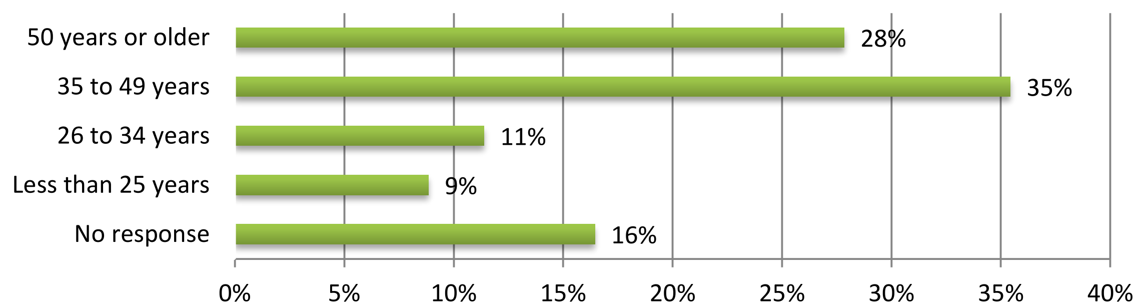


Figure 21 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Wages

When reporting on average wages for skilled or professional workers, 18% indicated they pay between $20 and $29 per hour and 16% reported they pay less than $20 per hour. The most commonly reported average wage for semi-skilled workers was under $20 (22%) and the most commonly reported average wage for entry-level workers was $10-$12(27%). Thirty-five percent of businesses reported that their wage scale is the same as that of other businesses in the region.

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

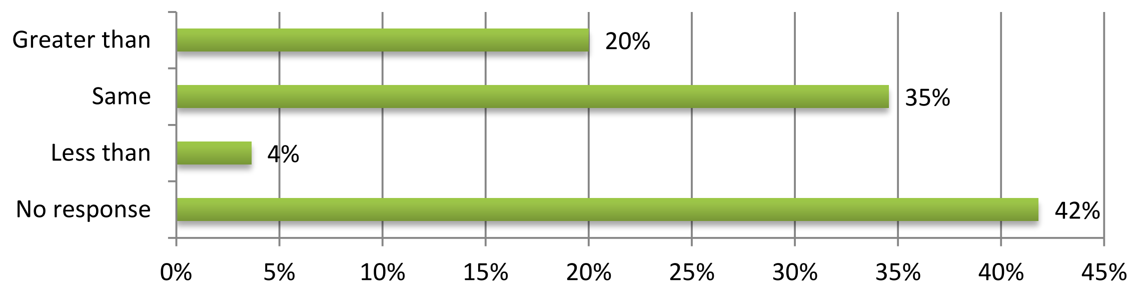


Figure 22 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Recruitment and Retention

Forty-seven percent of respondents agreed that the number of unfilled positions at their company has remained relatively constant. It should be noted that many of the businesses that did not have any unfilled positions also indicated the number of unfilled positions was staying the same.

Figure 23: Trend in unfilled positions

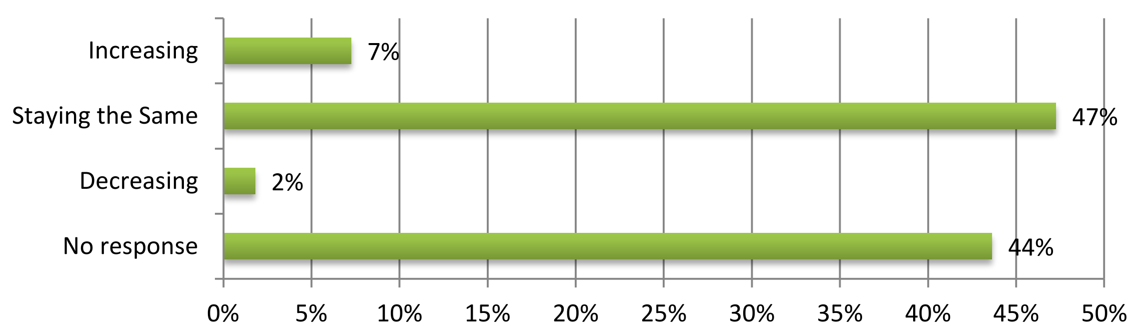


Figure 23 percentages are out of 55 respondent businesses that completed the BRE Long Survey

The vast majority of respondents (82%) reported that they primarily recruit employees from local labour markets.

Figure 24: Location of workforce recruitment

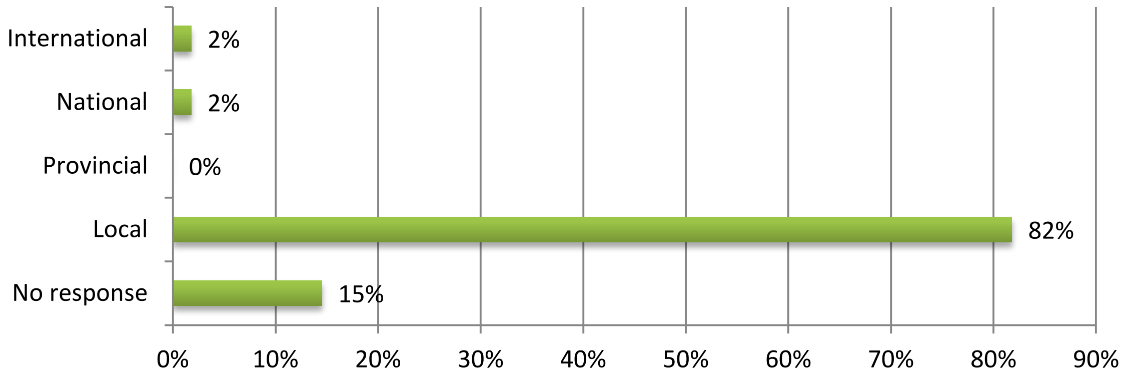


Figure 24 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Thirty-five percent of respondents indicated that they have experienced retention challenges and 34% indicated that they have experienced recruitment challenges.

Figure 25: Recruitment and retention challenges

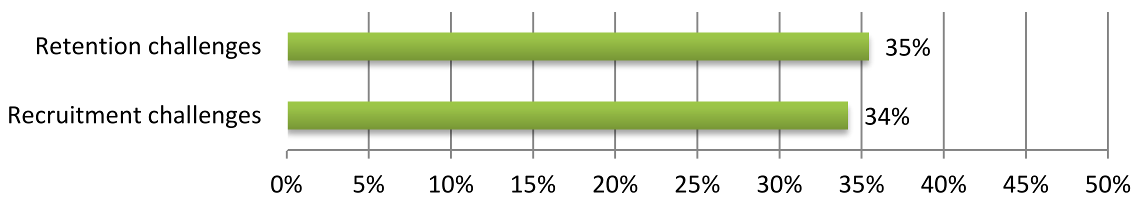


Figure 25 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

When asked what efforts their business has undertaken to retain employees, many shared that they have focused on fostering a good work environment and healthy relationships (8 respondents) and offering benefits and perks (7 respondents). Other common ways respondents sought to retain employees were by offering competitive wages and monetary incentives such as bonuses (6 respondents), training opportunities (6 respondents) and flexible hours and scheduling (6 respondents).

Figure 26: Key words and responses in respondents' discussion of retention efforts

"[We] provide affordable housing on site for staff."

"Thank staff after every shift. Appreciate and value input from staff."

"Good health benefits. Flex-time and scheduling."

In their discussions of the perceived reasons for their retention challenges, respondents most often cited a shortage of skilled labour (9 respondents), the seasonal or temporary nature of their business (6 respondents) or shortage of consistent or full time work (3 respondents). Other challenges mentioned included the inability to pay competitive wages a lack of local training and a small workforce to draw from.

When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often from BRE Long Survey respondents were word of mouth (29%), signs and newspaper advertising (25%), and online ads through websites or social media (16%). Respondents also cited using connections to industry (7%), youth hiring programs (5%), schools, universities or trades programs (4%), and job fairs or recruitment specialists (2%). Interestingly, 24% of businesses do not engage in recruitment activities.

The most important recruitment areas among the 27 surveyed businesses experiencing recruitment problems include machine operators (19%), general laborers (19%) and administrative/clerical personnel (15%). The responses included in the 'other' and 'professional other' categories charted below are detailed in Appendix A.

Figure 27: Current recruitment areas

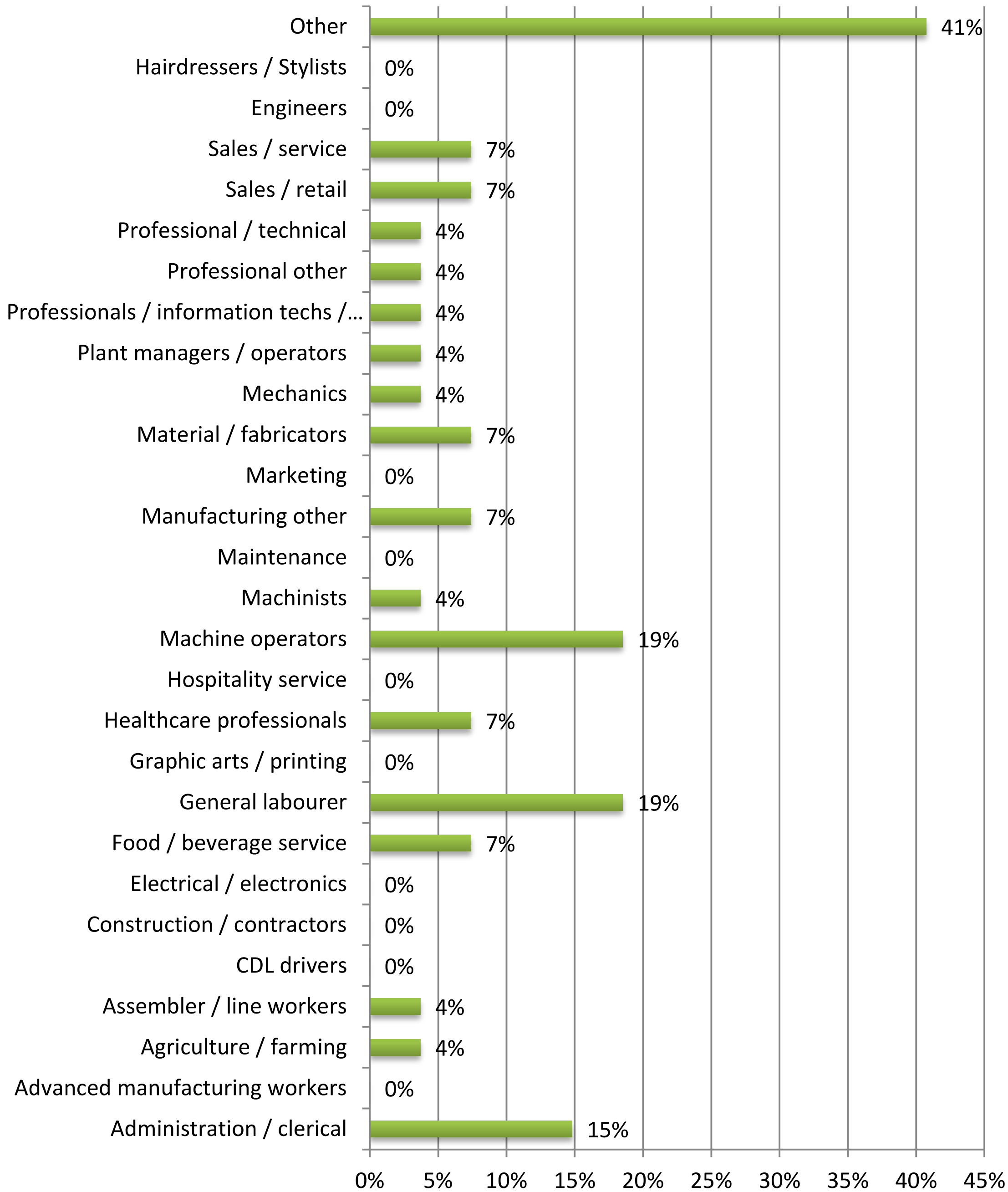


Figure 27 percentages are out of 27 respondent businesses reporting recruitment challenges

Thirty-nine percent of respondents expect future recruitment challenges. The most common anticipated recruitment areas include sales/ retail (23%), sales/ service (10%) and machine operators (10%).

Figure 28: Future recruitment areas

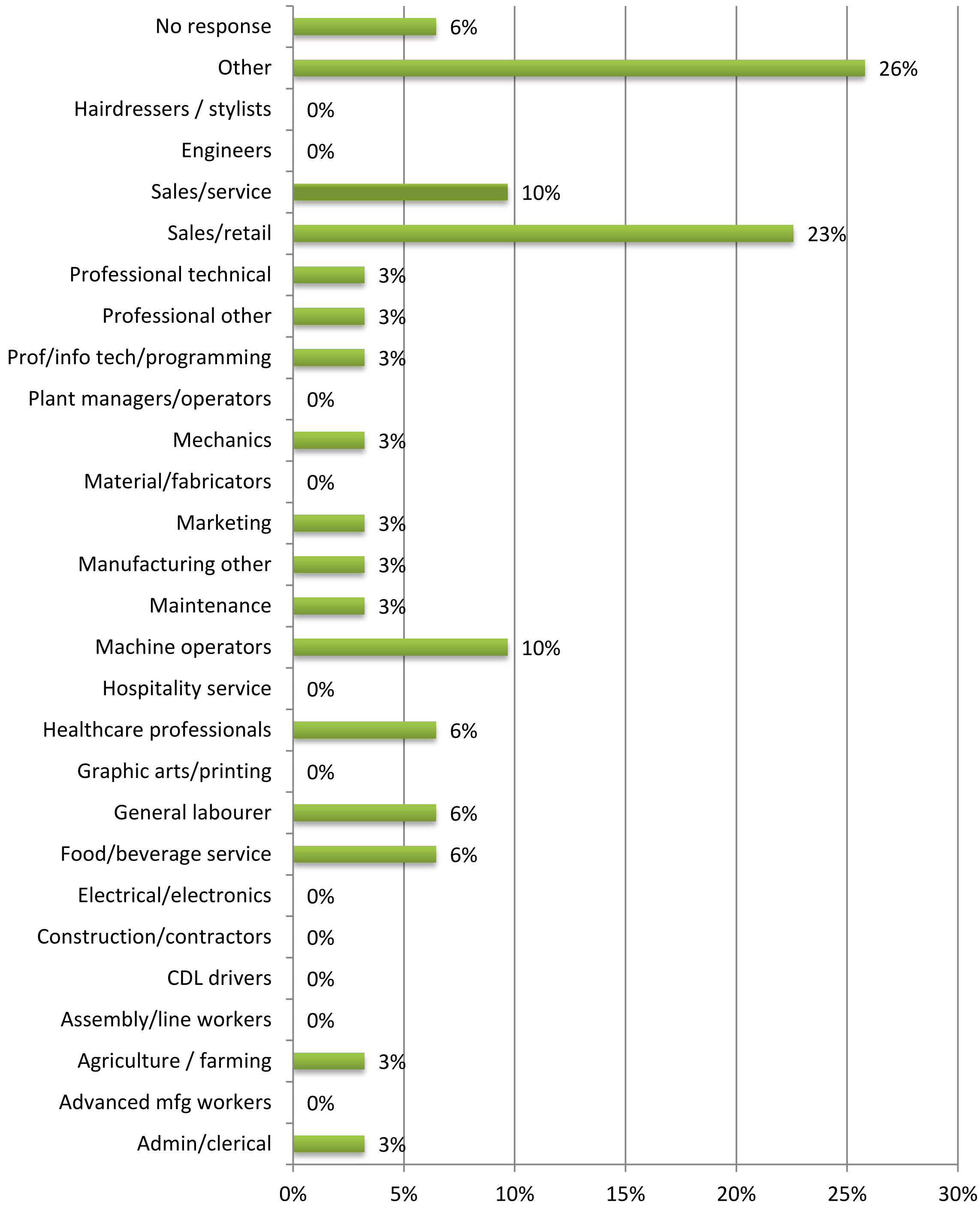


Figure 28 percentages are out of 31 respondent businesses anticipating future recruitment difficulties

Skills and Training

Thirty-six percent of businesses indicated that over half of their workforce is comprised of skilled or professional workers, 13% indicated that their workforce is mainly semi-skilled workers and 13% indicated that entry-level workers make up the majority of their workforce.

Figure 29: Skill level of majority of workforce

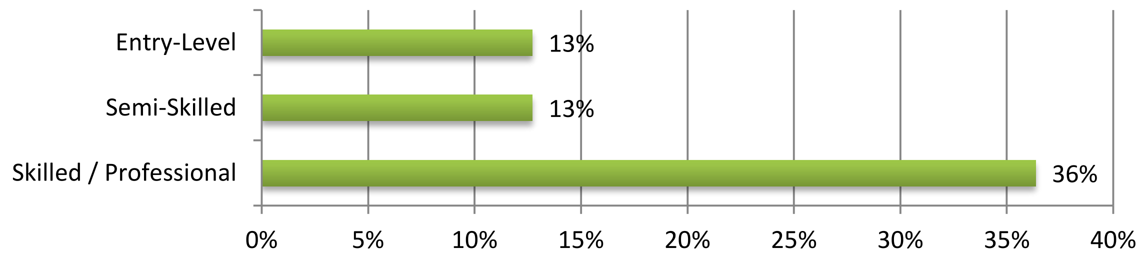


Figure 29 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Thirty-six percent of businesses indicated that their company has a training budget and 75% of repondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were business/management training (25%), marketing/sales (15%) and first aid/ safety (15%).

Figure 30: Training or professional development needs

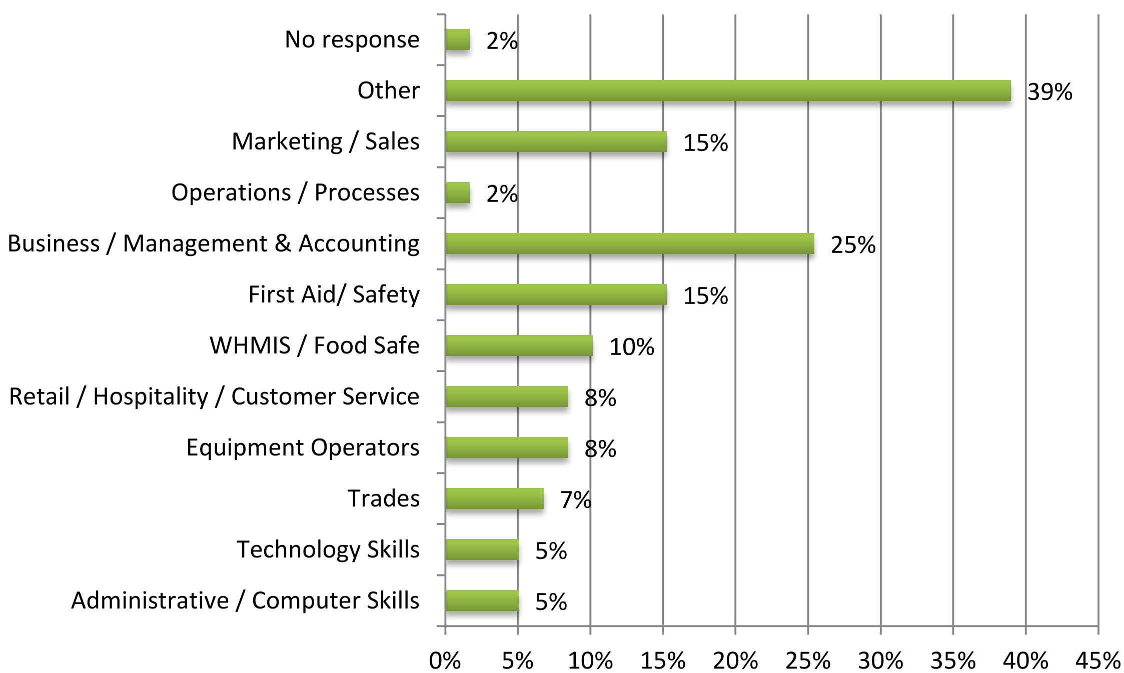


Figure 30 percentages are out of 59 respondents reporting areas of training that would be beneficial

Forty-seven percent of respondents stated that they prefer when training is delivered through an in-person, classroom or seminar style format. Forty percent perfer individual coaching.

Figure 31: Preferred modes of training

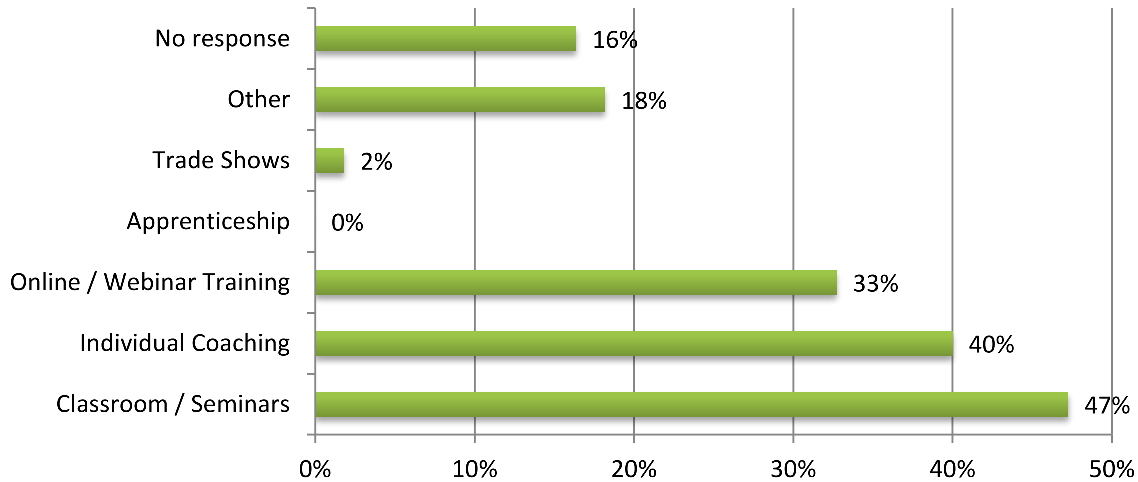


Figure 31 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Thirty-eight percent of respondents typically seek training opportunities that are offered in the region, 35% access training locally, and 27% travel to other areas in BC for their training.

Figure 32: Usual training locations

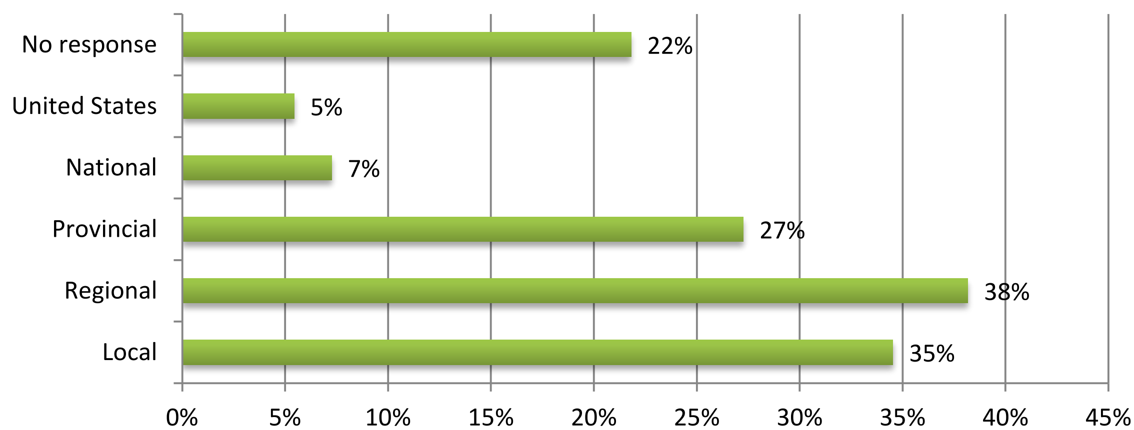


Figure 32 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Employees

The majority of respondents (53%) listed cost of living as an issue that is critical to their employees. Another important factor was transportation (33%). For a list of factors included in the other category charted below, see Appendix A.

Figure 33: Critical considerations for employees

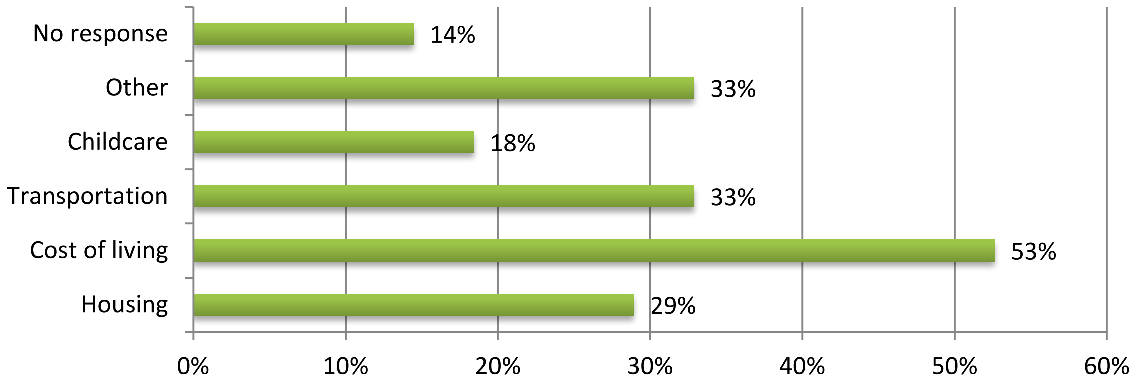


Figure 33 percentages are out of 76 respondent businesses that completed the region specific questions

Eighty percent of businesses interviewed reported that the majority of their employees live within the community. Four percent indicated that the majority of their employees live elsewhere in the region.

Sales

Market Size and Share

The highest number of respondents (7, 9%) reported annual sales of between $1 million and $4.99 million and 8% (6 respondents) reported annual sales between $100,000 and $499,999. The lowest number (5%) reported sales of more than $5,000,000. Seventy-two percent of businesses did not share annual sales information.

Figure 34: Annual sales

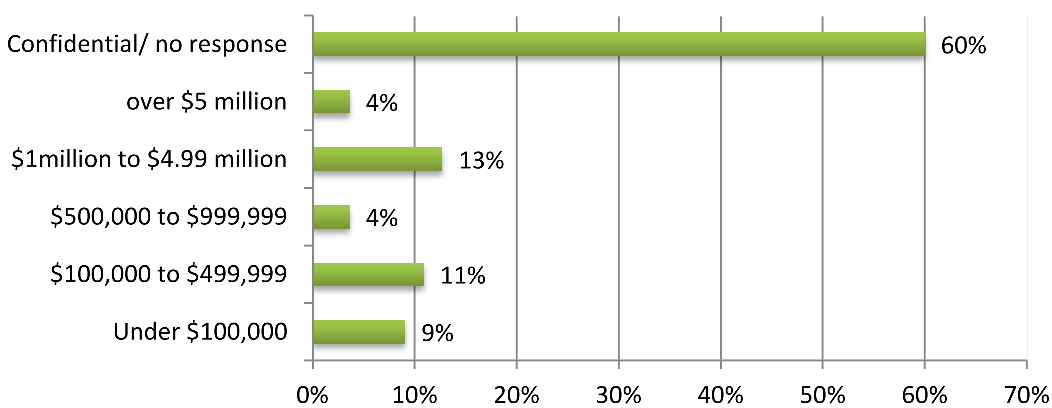


Figure 34 percentages are out of 55 respondent businesses that completed the BRE Long Survey

The majority of businesses interviewed (54%) indicated that the size of the market for their product or service is growing over time. Another 32% reported that the market is stable.

Figure 35: Status of market for product/service

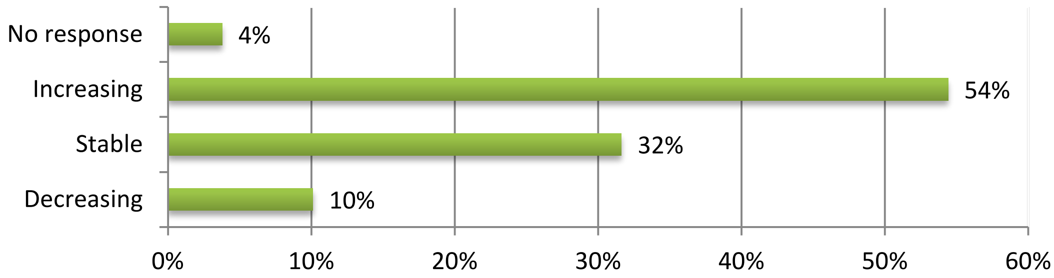


Figure 35 percentages are out of 76 respondent businesses that completed the BRE Long or Short Survey

Forty-four percent of respondents indicated that their share of the market for their product is increasing while 16% indicated that it is stable. A small number of respondents (5%) indicated that their market share is decreasing.

Figure 36: Status of market share

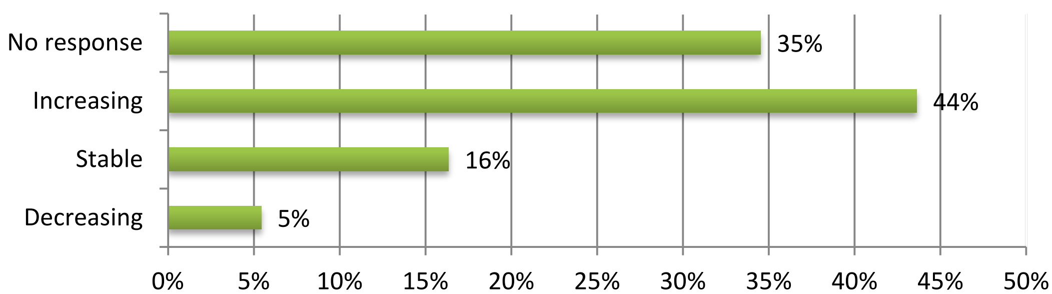


Figure 36 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Growth

Thirty-four percent of respondents expect to see moderate growth in sales of 10-24% over the next year and 20% expect to see lower growth of between 1 and 9%. Four percent of respondents expect their sales to decline and 13% expect sales to remain stagnant.

Figure 37: Projected sales growth over next year

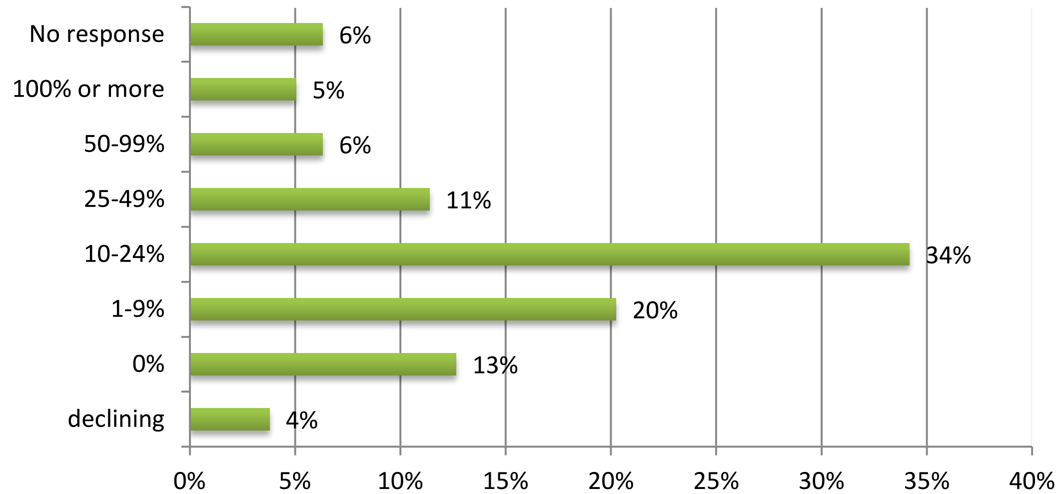


Figure 37 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Sixty percent of businesses indicated that sales at their business have increased over time, 16% indicated that sales have remained relatively stable and 13% reported that sales have declined.

Figure 38: Historic sales trend at this location

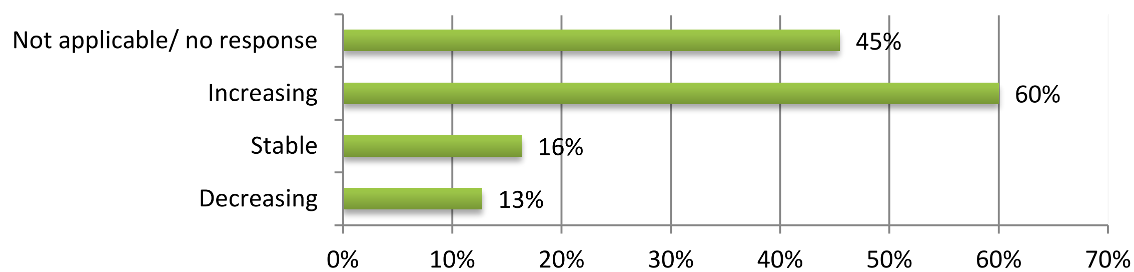


Figure 38 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Seven percent of respondents indicated that sales at their parent company have historically decreased.

Figure 39: Historic sales trend at parent company

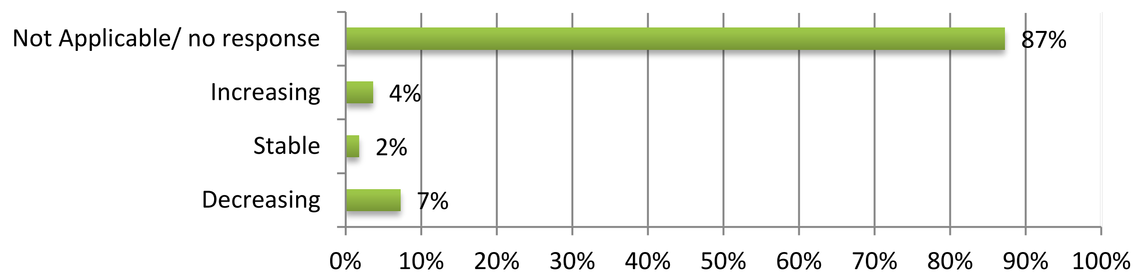


Figure 39 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Data indicate that the sales trend within respondents' respective industries has been less positive. Sixty-nine percent of respodents reported that sales within their industry have been decreasing while 22% reported that they have been increasing.

Figure 40: Historic sales trend in industry

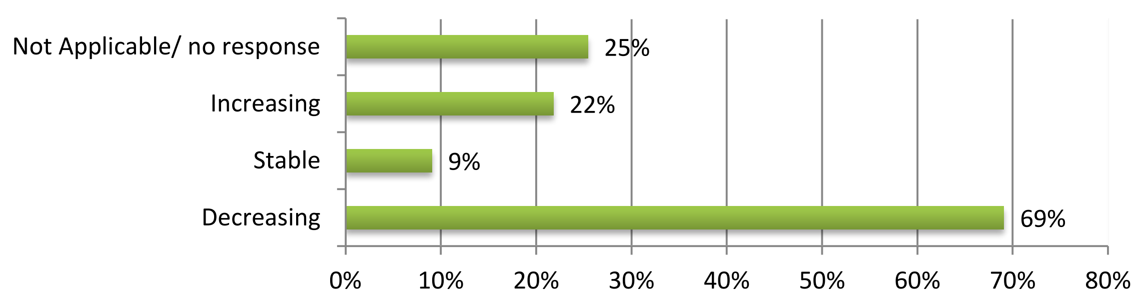


Figure 40 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Five percent of BRE Long Survey Respondents indicated that their export sales have been increasing and 5% indicated that they have been declining.

Figure 41: Historical export sales trend

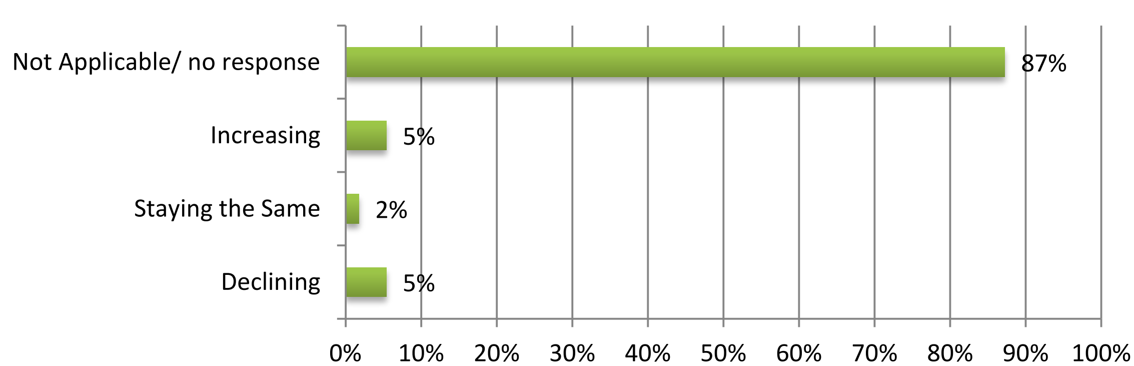


Figure 41 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Source of Sales

The customer base among Slocan Valley businesses seems to be diverse. The largest percentage of respondents (35%) indicated that less than 10% of their sales are generated by their top 3 customers.

Figure 42: Component of sales generated by top 3 customers

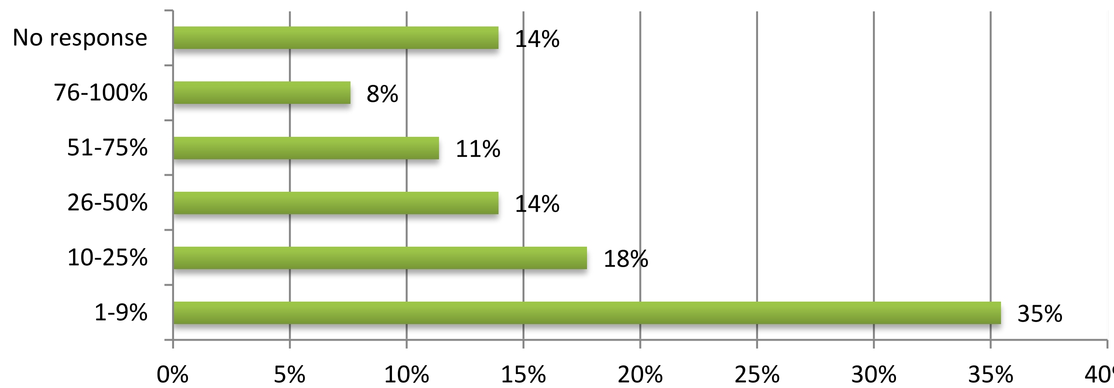


Figure 42 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

A majority of respondents (73%) indicated that over 50% of their sales are to customers within the community or region. 5% indicated that over half of their sales are within BC and 6% within Canada. Fewer respondents (1%, 3%) indicated that the majority of their sales are to US or international markets, respectively.

Figure 43: Geographic source of majority of sales

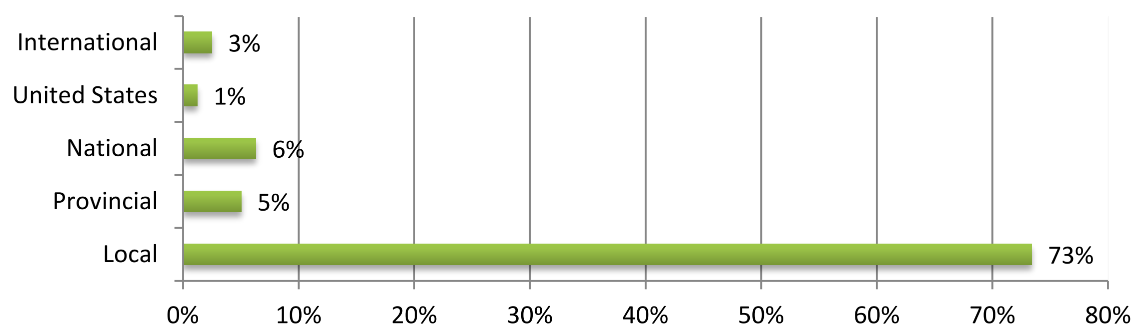


Figure 43 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Five respondents (9%) indicated that they export good or services to other countries and 3 respondents (5%) indicated that they import goods or services from other countries.

Figure 44: International trade status

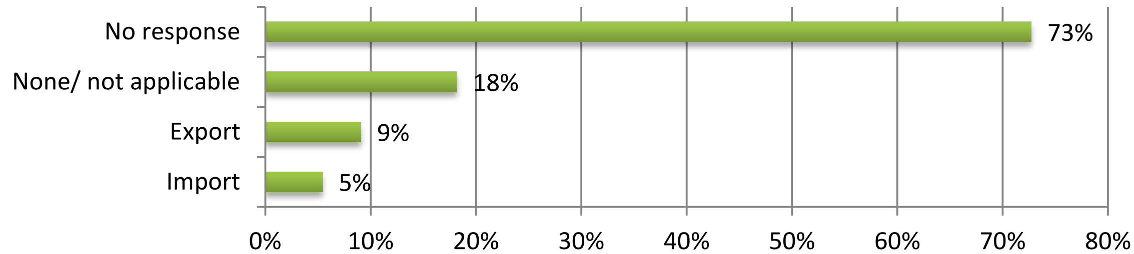
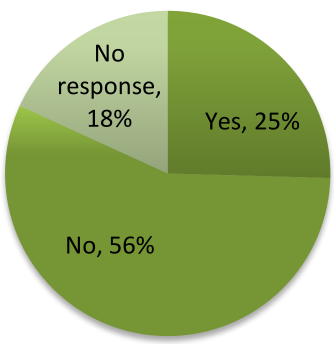


Figure 44 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Procurement

Figure 45: Engagement with government procurement processes



Twenty-five percent of businesses indicated they engage in government procurement.

Figure 45 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Thirty-seven pecent of businesses interviewed reported that they purchase supplies primarily from local sources. Another 35% indicated that the majority of their supplies come from businesses located elsewhere in BC.

Figure 46: Geographic source of majority of supplies

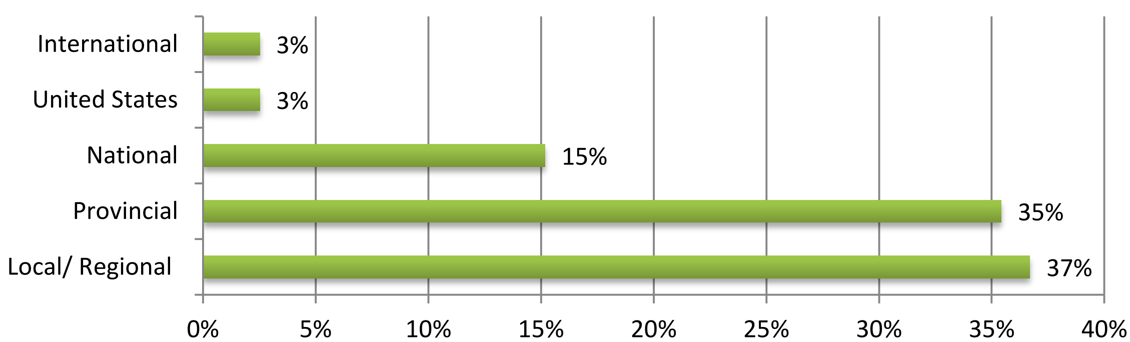


Figure 46 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, over half (51%) indicated that the products they need are not available locally. Twenty-five percent also indicated that products tend to cost more from local suppliers.

Figure 47: Reason for out-of-area purchasing

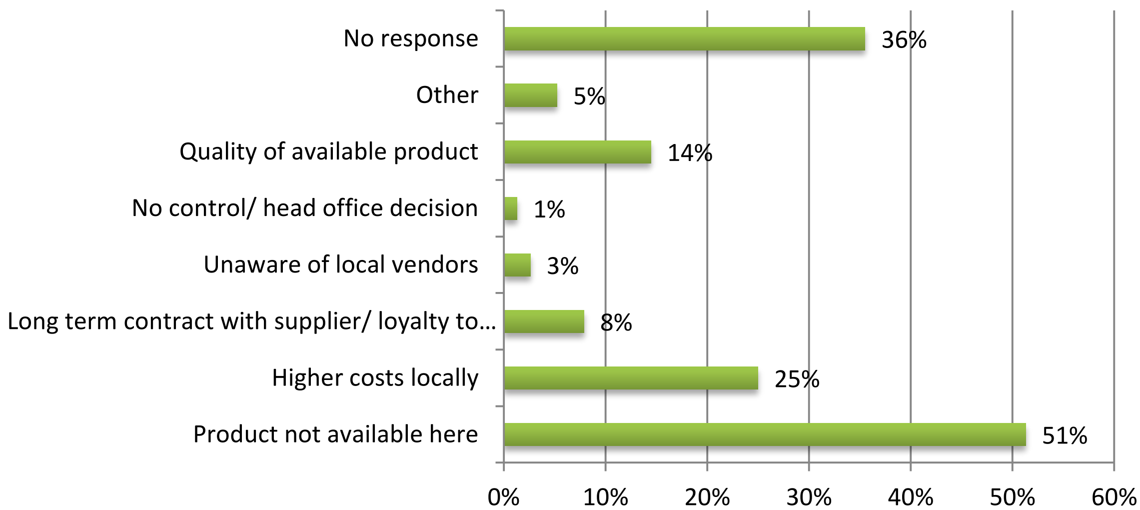


Figure 47 percentages are out of 76 respondent businesses that completed the region specific questions

Products that businesses stated they would like a local supplier include linens and textiles, yard care equipment and gardening supplies, wood working, craft and art supplies, fresh local produce and groceries, tools, chemicals, office supplies and computers.

Facilities and Equipment

Size and Condition

Twenty-five percent of businesses reported that their facility is less than 1000 square feet in size and another twenty percent indicated it is between 1,000 and 4,999 square feet. Twenty-five percent of businesses who completed the BRE Long Survey did not respond to this question.

Figure 48: Size of facility

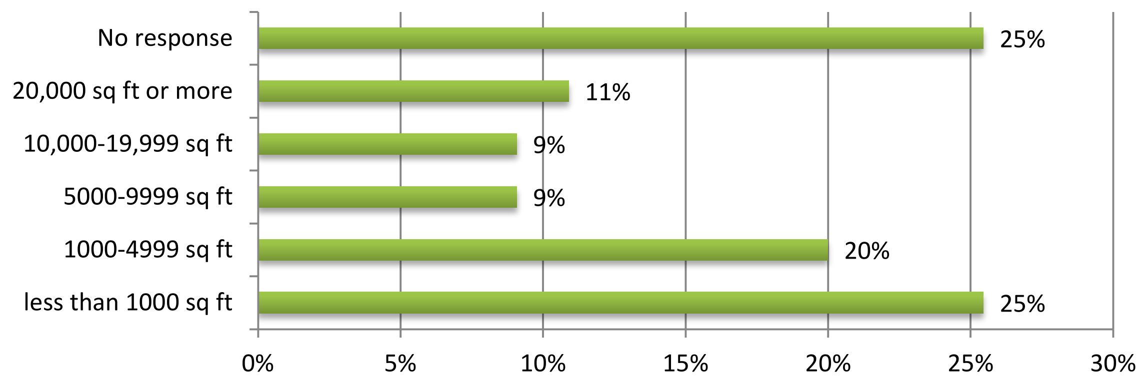


Figure 48 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Forty-seven percent of respondents indicated that their facility is in good condition. Another 29% indicated that it is in excellent condition, and 14% reported that the condition of their facility is fair.

Figure 49: Condition of facility

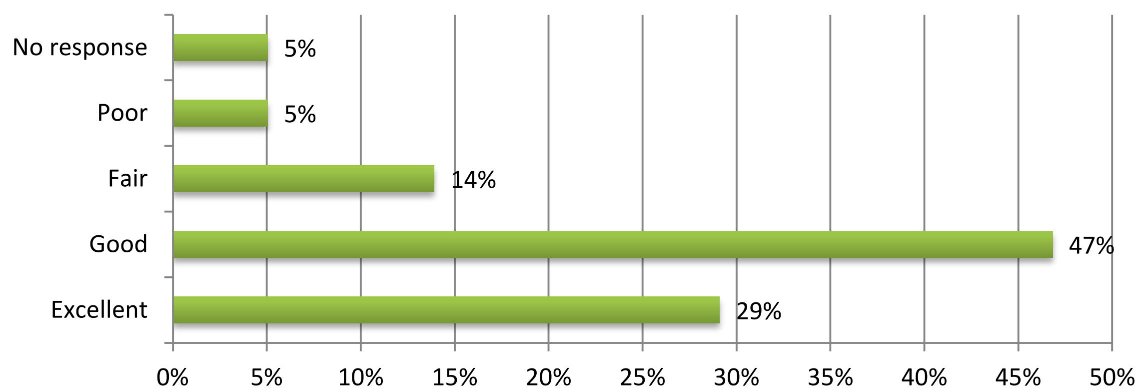


Figure 49 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Fifty-seven percent of respondents indicated that their equipment is in good condition. Another 24% indicated that it is in excellent condition and 15% report their equipment is in fair condition.

Figure 50: Condition of equipment

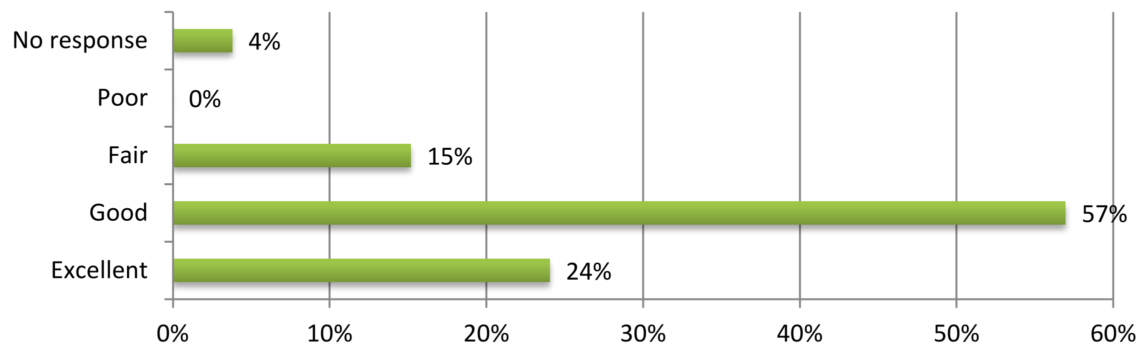


Figure 50 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Shifts

The highest number of surveyed businesses (58%) operate one shift per day, 13% operate two shifts and 7% run 24-hours per day.

Figure 51: Number of shifts

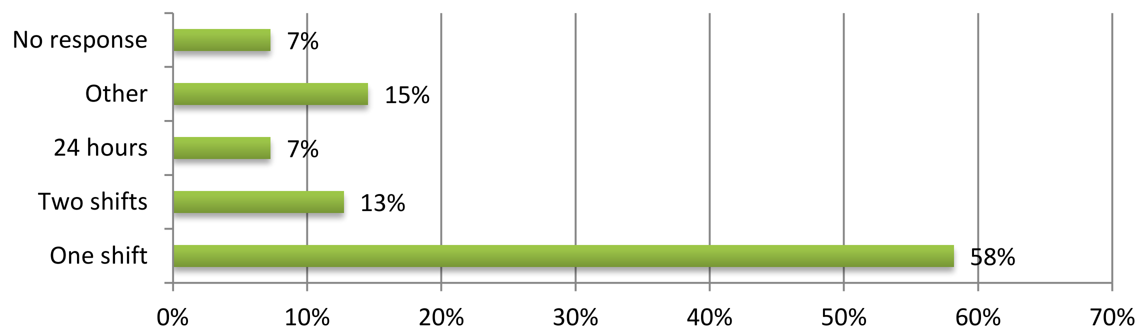
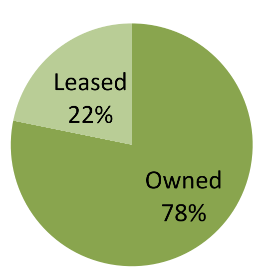


Figure 51 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Ownership

Figure 52: Ownership status of facility



Seventy-eight percent of businesses own the facility in which they operate and 22% lease it.

25% of respondents who lease their facility indicated they have less than a year remaining on their lease and 17% have more than 5 years remaining.

15 of the 16 businesses who responded to this question indicated that they intend to renew their current lease agreement.

Figure 52 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Figure 53: Length of time remaining on lease

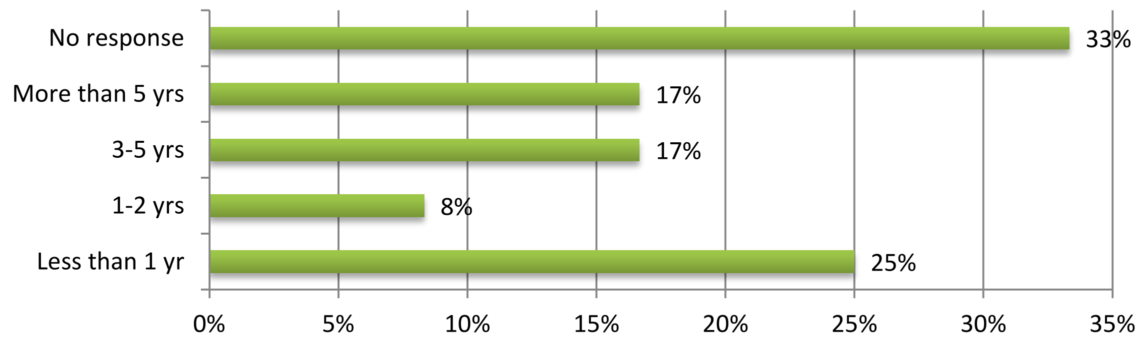


Figure 53 percentages are out of the 12 respondent businesses that report leasing their facility

Investment and Expansion

Over half of respondents indicated that their company's investment in their facility has stayed the same (36%) or increased (25%) over the past 18 months. No businesses indicated that investment in their facility has decreased over the same period.

Figure 54: Investment in facility (past 18 months)

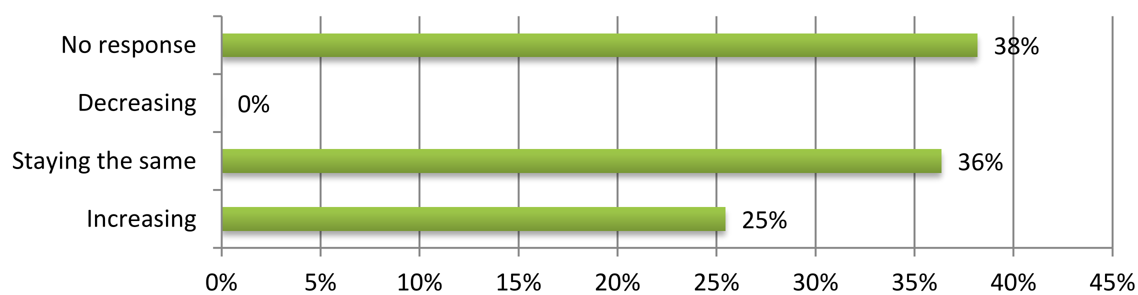


Figure 54 percentages are out of 55 respondent businesses that completed the BRE Long Survey

A similar trend was reported for recent investments in equipment .

Figure 55: Investment in equipment (past 18 months)

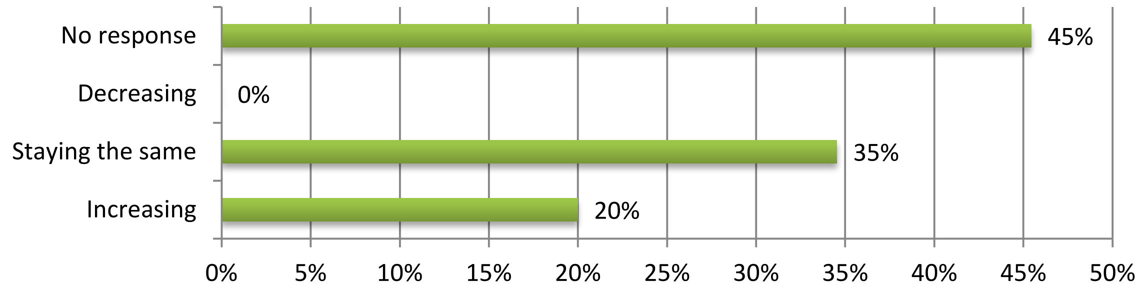
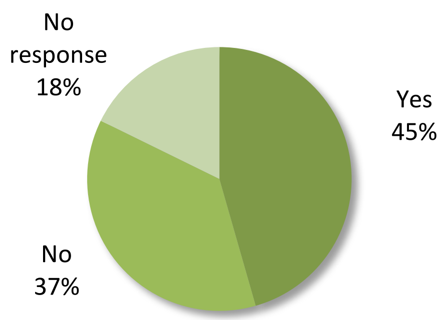


Figure 55 percentages are out of 55 respondent businesses that completed the BRE Long Survey

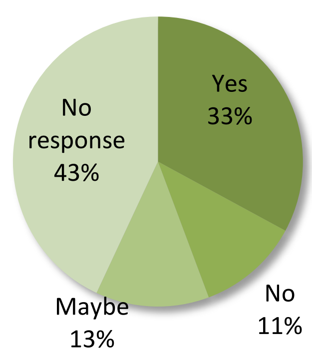
Figure 56: Plans to expand within three years



Almost half (45%) of interviewed businesses plan to expand within three years and 37% do not.

Figure 56 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Figure 57: Adequacy of current site to support expansion



33% of businesses reported that their current site will be adequate. Notably, however, 9 businesses (11%) reported that they will have to look for a new site to meet their planned expansion needs.

Figure 57 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

In total, the businesses interviewed plan to spend over $6.6 million on expansion over the next three years. The highest number of businesses (7%) plan to spend between $100,000 and $499,999, and 5% plan to spend between $1 million and $4.9 million.

Figure 58: Estimated expansion investment

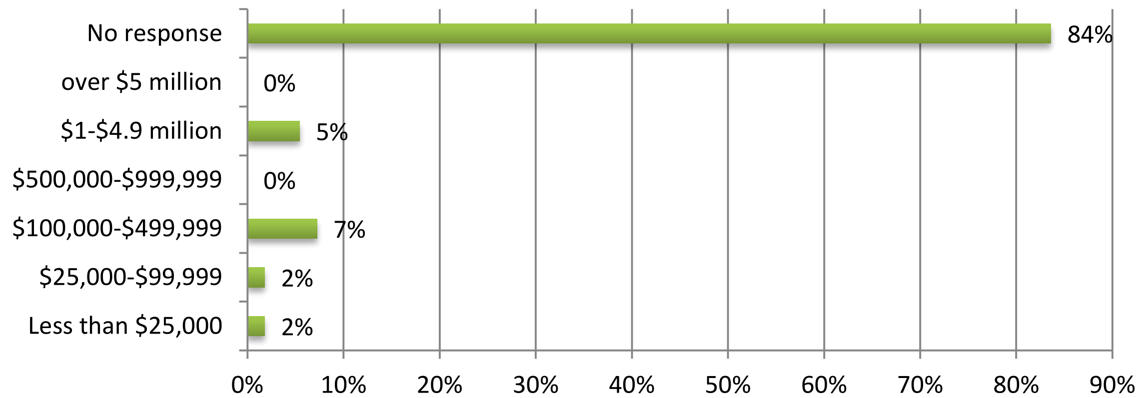


Figure 58 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Seven percent of businesses plan to spend over half of their expansion budget on real estate and eight percent plan to spend the majority of their expansion budget on equipment and technology.

Figure 59: Component of expansion budget for equipment and technology

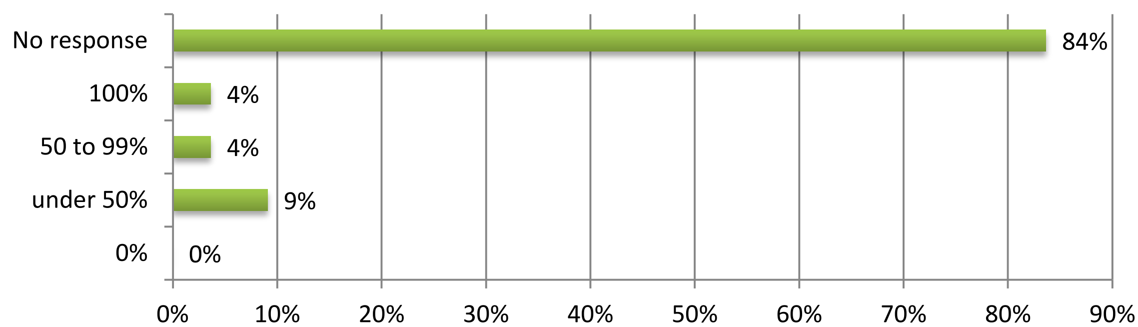


Figure 60: Component of expansion budget for real estate

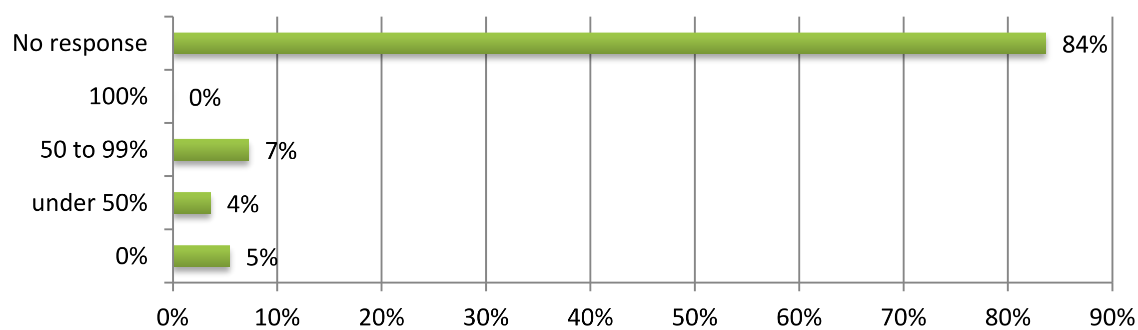


Figure 59 and 60 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Fifteen percent of respondents expect that the size of their facility expansion will be less than

1,000 square feet. Nine percent of respondents reported their expansion would be between 1,000 and 4,999 square feet.

Figure 61: Size of facility expansion

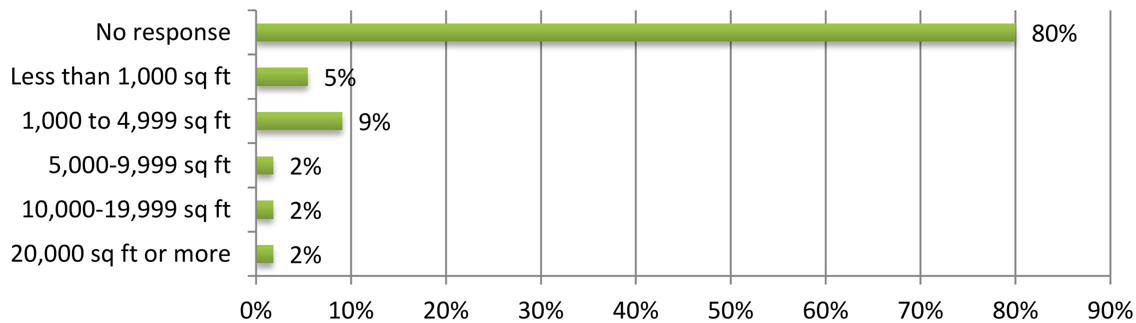


Figure 61 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Respondents cited a variety of factors that act as barriers to their expansion. Most common of those were financing (19%), identifying and accessing new markets (18%), a lack of suitable premises (11%) and problems with development approvals (9%).

Figure 62: Barriers to expansion

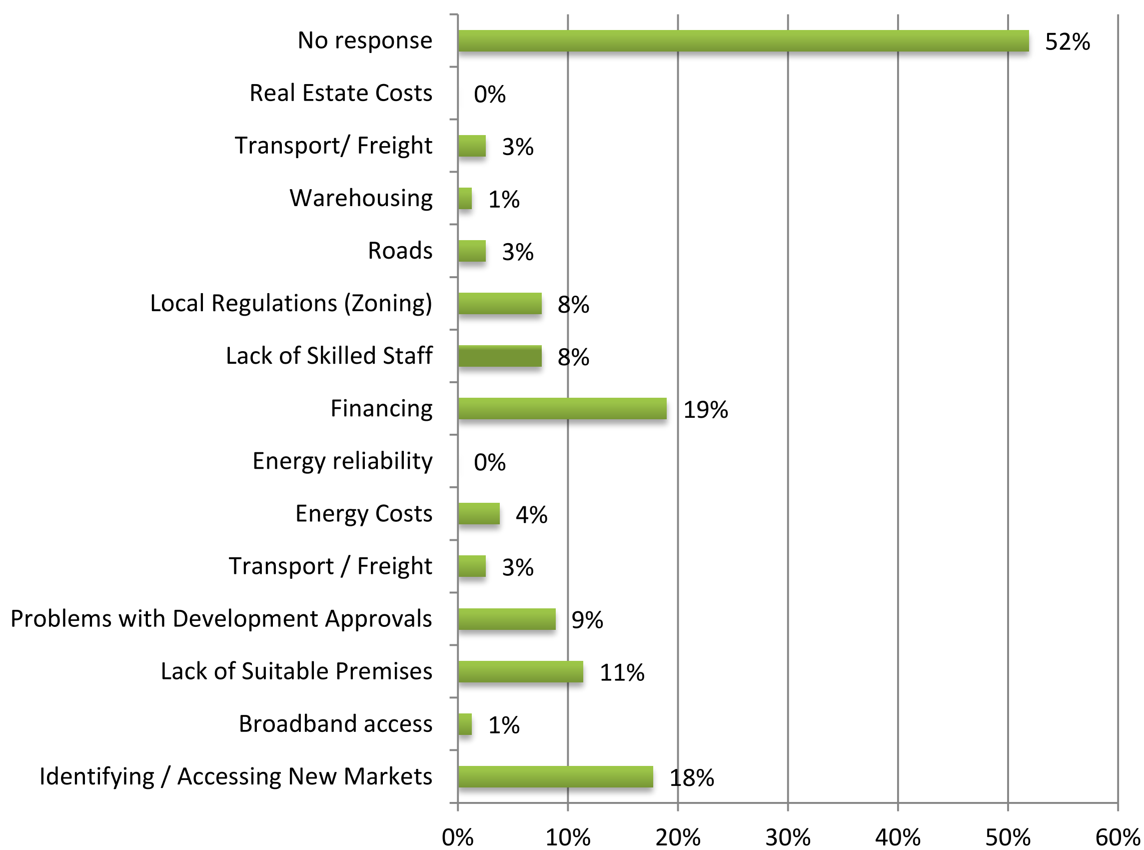
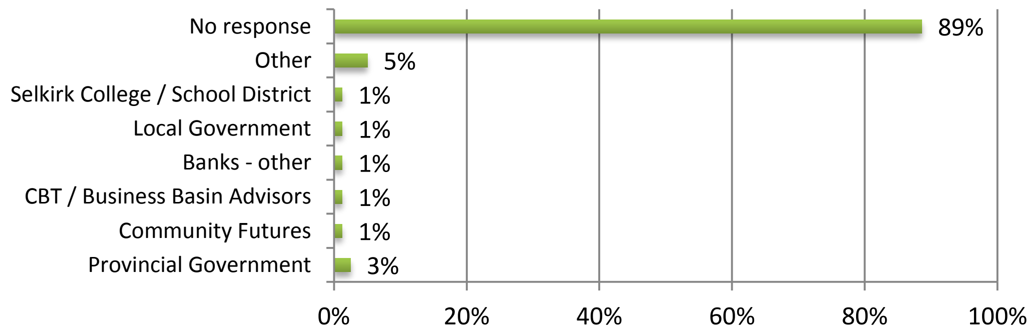


Figure 62 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Twenty-two percent of respondents indicated that they have sought assistance with their expansion efforts from an external organization. Organizations most commonly approached by slocan valley businesses include the provincial government (3%), 1% of respondents have approached each of the following: Community Futures; Columbia Basin Trust; a financial institution; or Selkirk College/ the School District.

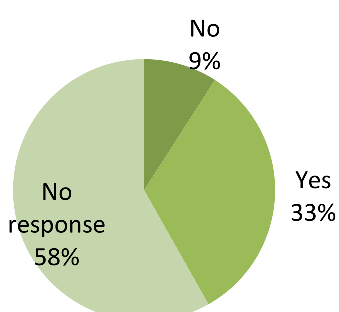
Figure 63: Organizations approached for expansion assistance



Energy Efficiency

Figure 64: Considering energy efficiency in expansion plans

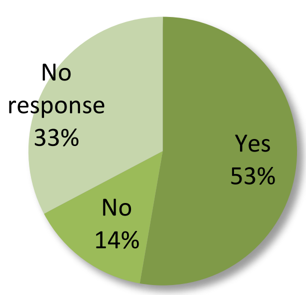
Figure 63 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey



Thirty-three percent of businesses who completed the BRE Long Survey reported that they are considering energy efficiency in their expansion plans.

Figure 61 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Figure 65: Awareness of BC Hydro Power Smart



Fifty-three percent of respondents reported that they are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Figure 61 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Government Services

Respondents were asked to rate a list of government services as fair, poor, average, good, excellent or not applicable to their business. The services that received the highest number of average, fair or poor ratings were access to airport facilities (57%) and telecommunications (56%). The services that received the highest number of good or excellent ratings were access to highways/ roads (70%) and recycling (63%).

Figure 66: Rating of government services

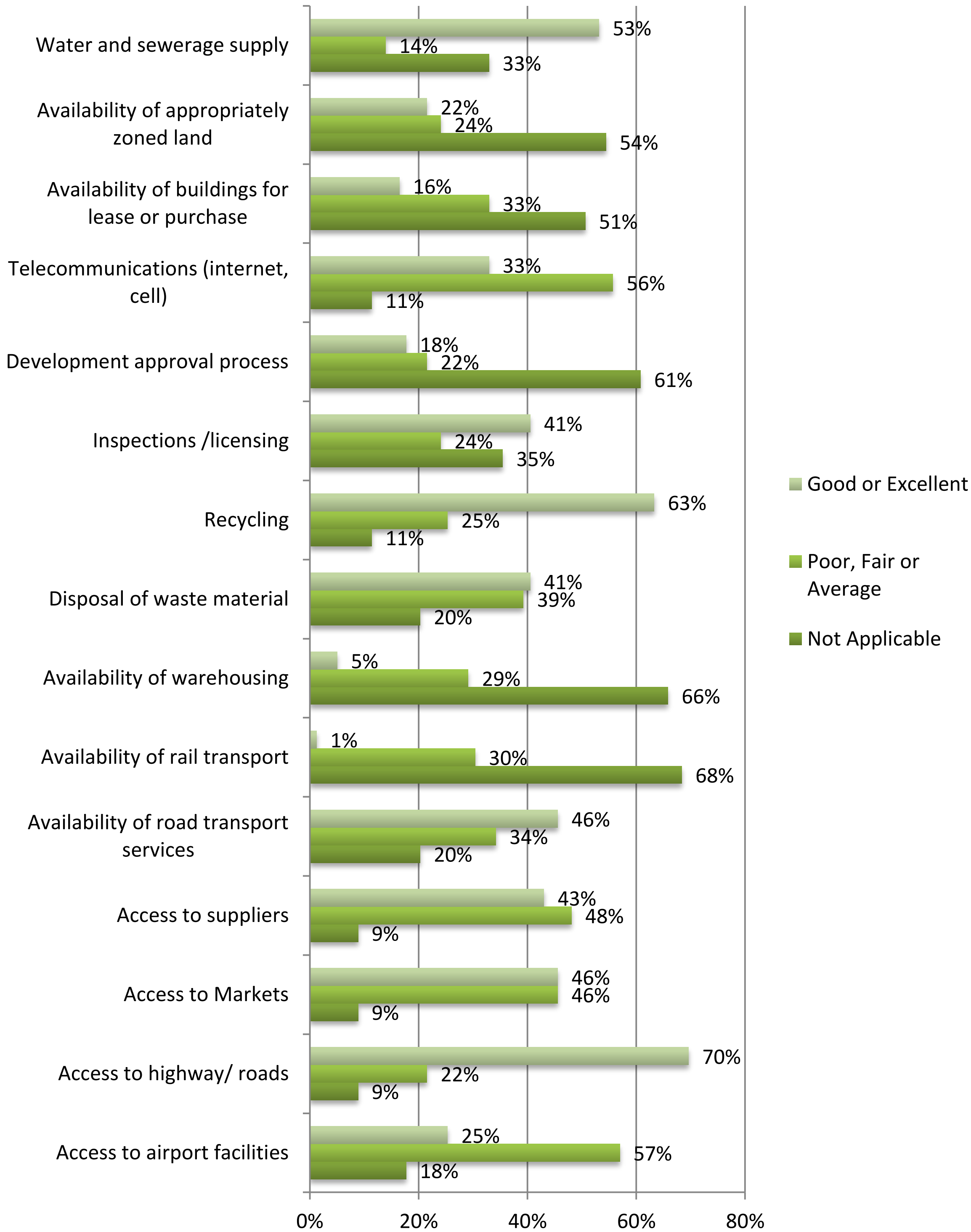


Figure 66 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Fifty respondents(63%) provided suggestions on how to improve government services. The highest number of responses (15) discussed improvements to telecommunications including cellular service and high speed internet. Expanding recycling and waste disposal services (7 respondents) and improving airport services and bus links to major airports in Kelowna (7 respondents) also factored heavily in these discussions. The following exerpts from three respondents' survey data illustrate the importance of improving telecommunications for Slocan Valley businesses:

> *"Cellular phone service would reduce costs and card processing fees."*
>
> *"Access to [landline telephone service] is fine but cost is too high for small businesses to afford. It is a 'have to have' for safety reasons so [businesses] have no choice but to pay for the service."*
>
> *"Instead of wireless internet why not run fibre to the village and run fibre or copper to the homes? This would make telecommunications and internet be more viable, efficient, and offer a higher level of service to customers."*

Figure 67: Key words and responses in respondents' suggestions for improvements to government services

"The airport needs better equipment for bad weather landings. A shuttle service to Kelowna if flights are cancelled would help. Business travel is compromised."

"Having a regional, public (or private) shuttle to airports available in the area would be great. Better public transportation opportunities or options would be great."

Business Climate

Quality of Business Climate

Respondents rated the quality of a list of business climate factors as either poor, fair, good, excellent or not applicable to their business. The factors that received the highest number of fair or poor ratings included workforce stability (66%) and housing(65%). The factors that received the highest number of good or excellent ratings included k-12 education (63%) and cultural/recreational amenities (52%).

Figure 68: Rating of business climate factors

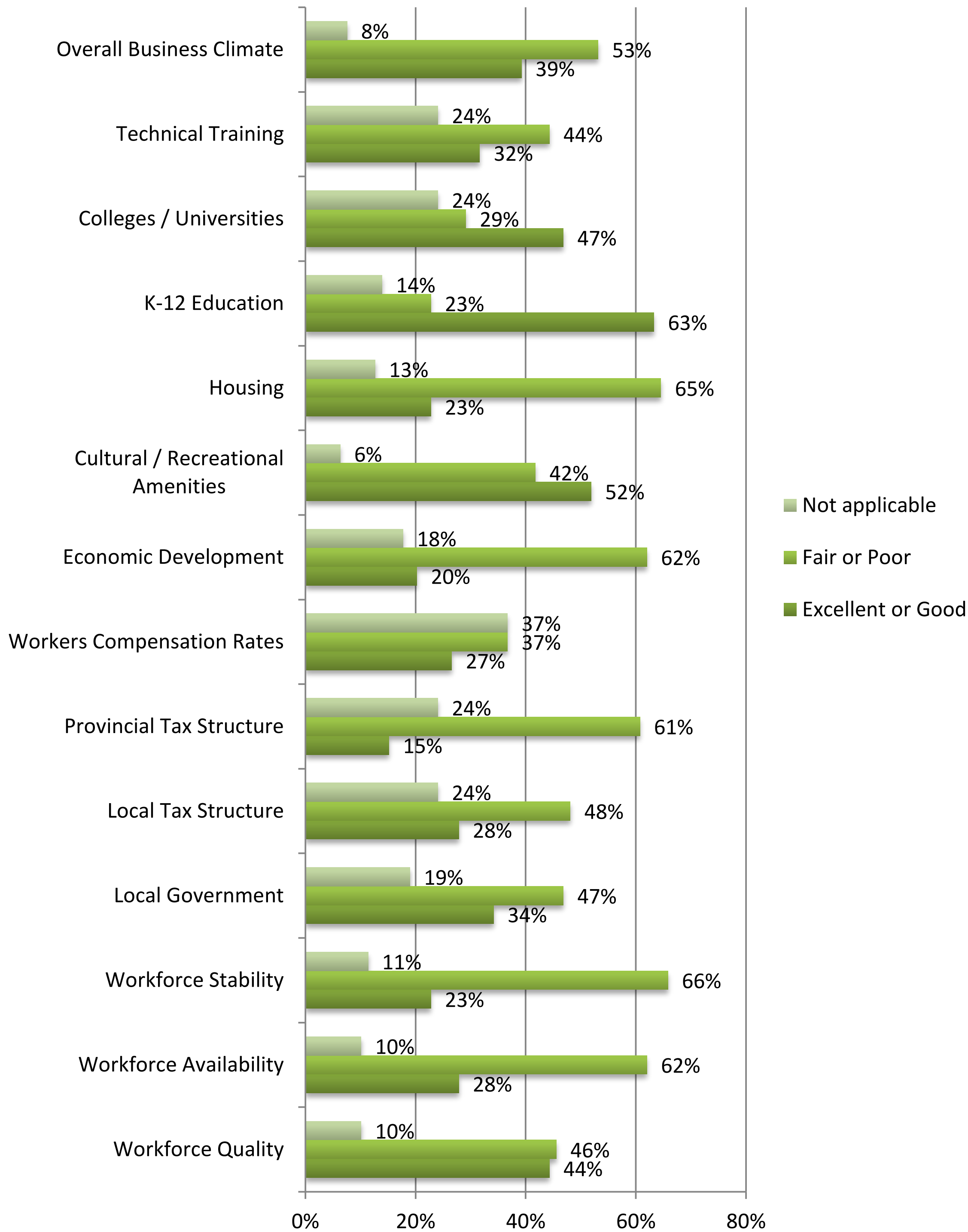


Figure 68 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Thirty-four percent of respondents felt that the business climate is worse today than it was 5 years ago. Thirty percent thought that it is better.

Figure 69: Business climate today vs. 5 years ago

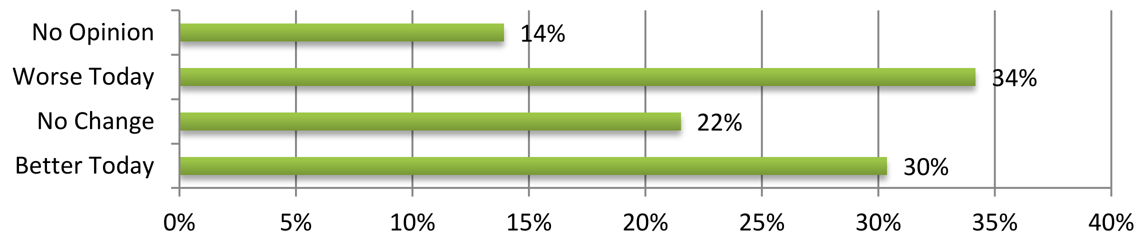


Figure 69 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Fifty-three percent of respondents expect that the business climate will be better 5 years from today. Six percent expect that it will be worse.

Figure 70: Business climate 5 years from today

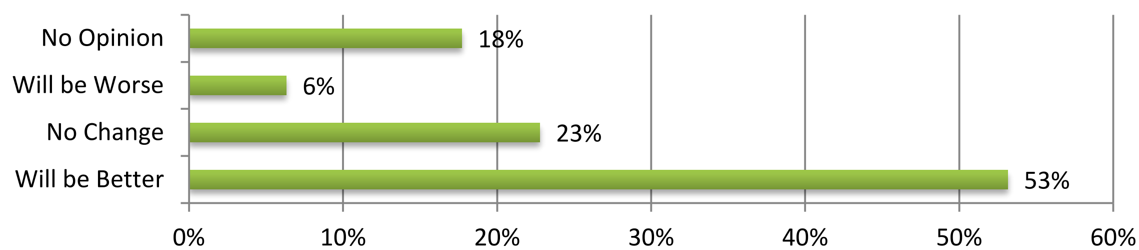


Figure 70 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Strengths and Weaknesses of Business Climate

When asked to list the community's strengths as a place to do business, the highest number of respondents (38%) cited the area's people—their loyalty as customers and stable population. 24% mentioned the beautiful natural environment and remote location and 22% discussed the healthy, safe and supportive community.

When asked to list the community's weaknesses as a place to do business, the highest number of respondents (27%) cited the isolated location and small population and market. Resistance to change and the mindsets of residents were also often mentioned (16%). Economic factors, such as low incomes/ lack of money in the area, lack of growth in the economy, and lack of reliable infrastructure were also commonly cited weaknesses (9% respectively).

Figure 71: Community's strengths as a place to do business

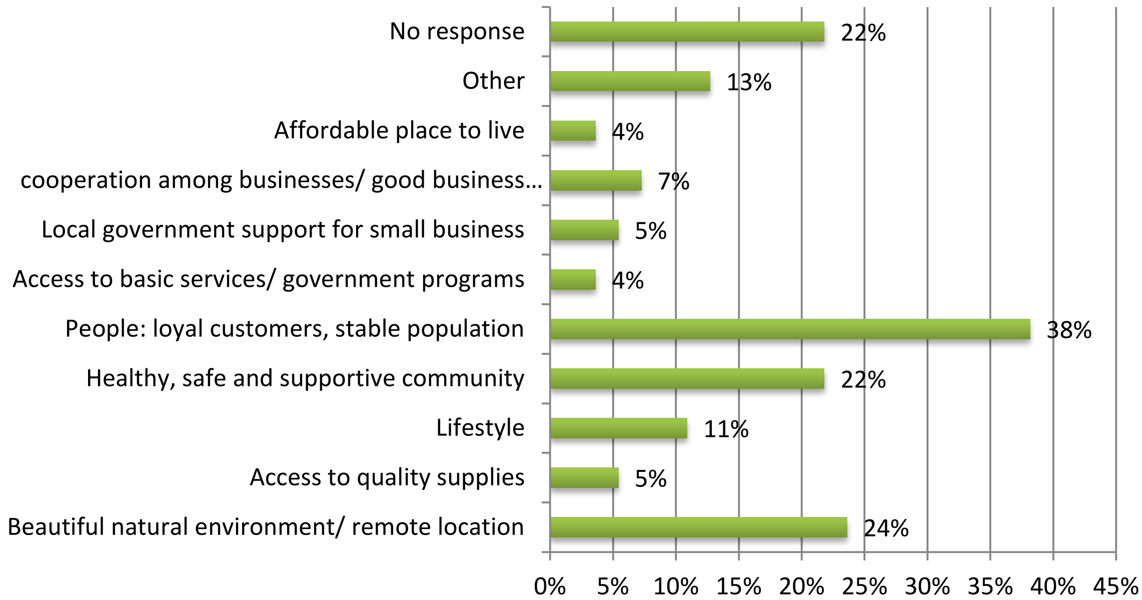
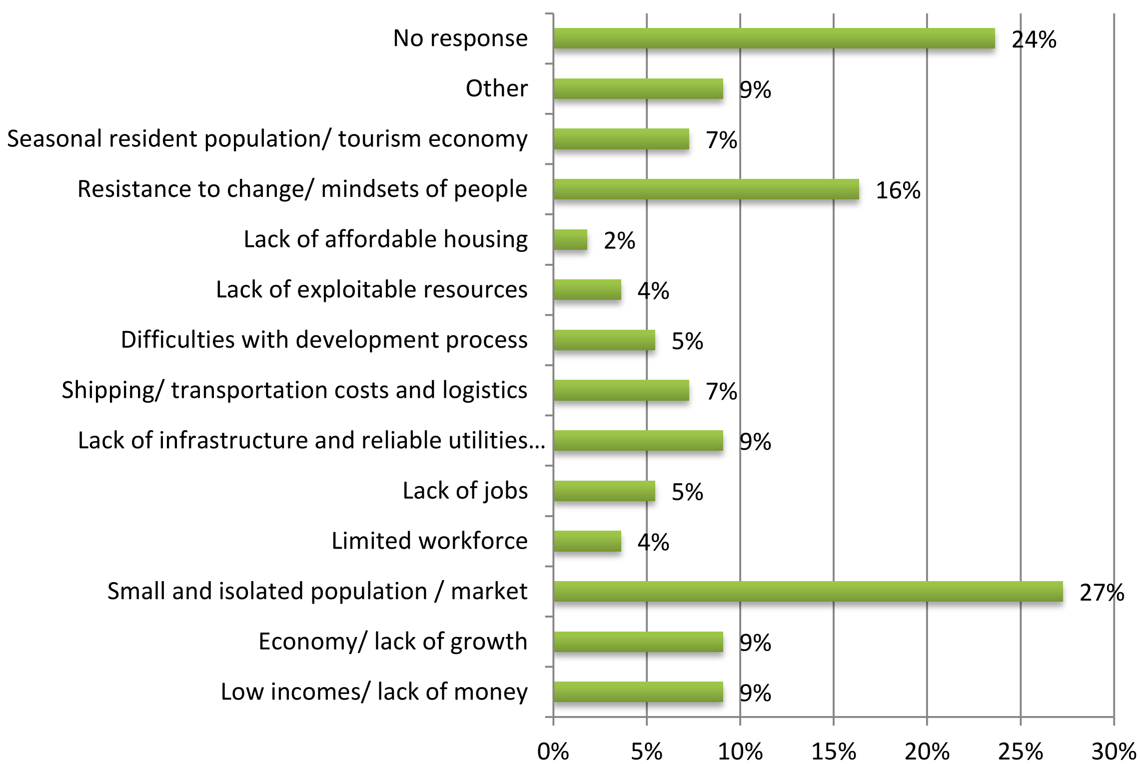


Figure 72: Community's weaknesses as a place to do business



Figures 71 and 72 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Ninety-five percent of respondents indicated there are barriers to growth in the community. The most commonly-cited barriers to growth of the regional economy were a lack of infrastructure, including telecommunications and sewer and the small population (17%). Thirteen percent of respondents also discussed the attitude of resistance to growth or change as a barrier to growing the community's economy, the high cost of housing and real estate and the isolated location. These sentiments are illustrated in the following excerpts respondents' survey data:

> *"[Barriers include] loss of population, limited health care facilities, [and] lack of available land for development or housing."*

> *"People who resist growth [are a barrier]. There is no agreement on economic growth."*

> *"Distance [to major cities] and remoteness is a factor in the growth of economy."*

> *"[There is a] lack of jobs in the village: a few residents are employed out of town so they do their shopping out of town as well."*

Figure 73: Barriers to growth in the community

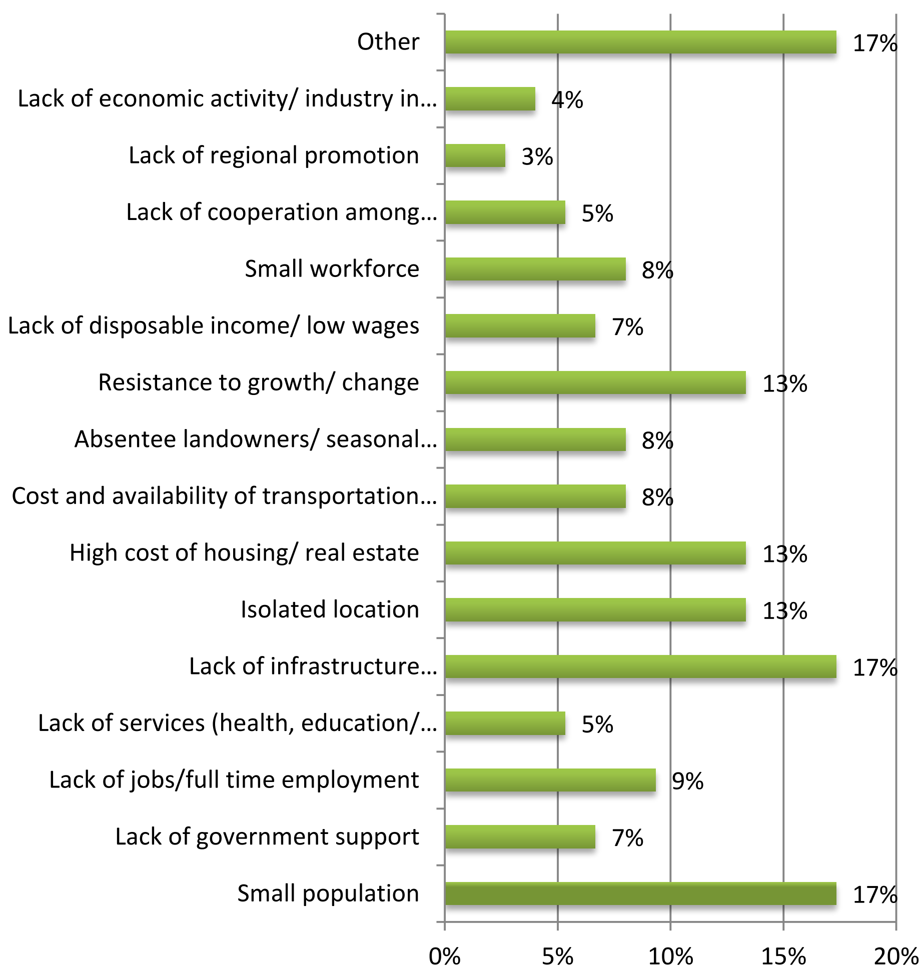


Figure 73 percentages are out of 75 respondent businesses that identified barriers to growth

Forty-seven percent of BRE Long Survey Participants indicated that there are key customers to attract to the region and 40% of respondents indicated that there are key suppliers that can be attracted. Customers cited by multiple businesses include tourists, specifically for the adventure and eco-tourism industry, families with children, new residents and seniors. Suppliers cited by multiple businesses included farmers, local meat and produce, hardware store, green technology suppliers, software development companies, and web-based or technology based businesses.

Business Competitiveness and Productivity

From a list of business competitiveness factors, those that received the highest number of somewhat important or very important ratings include improvement of customer services (88%), new market development locally (87%), workforce skill development (86%), and availability of telecommunications infrastructure and services (82%). The factors that received the highest number of not important at all or not very important ratings include expansion of workforce employees (42%) and reliable air transportation (39%).

Figure 74: Importance of business competitiveness factors

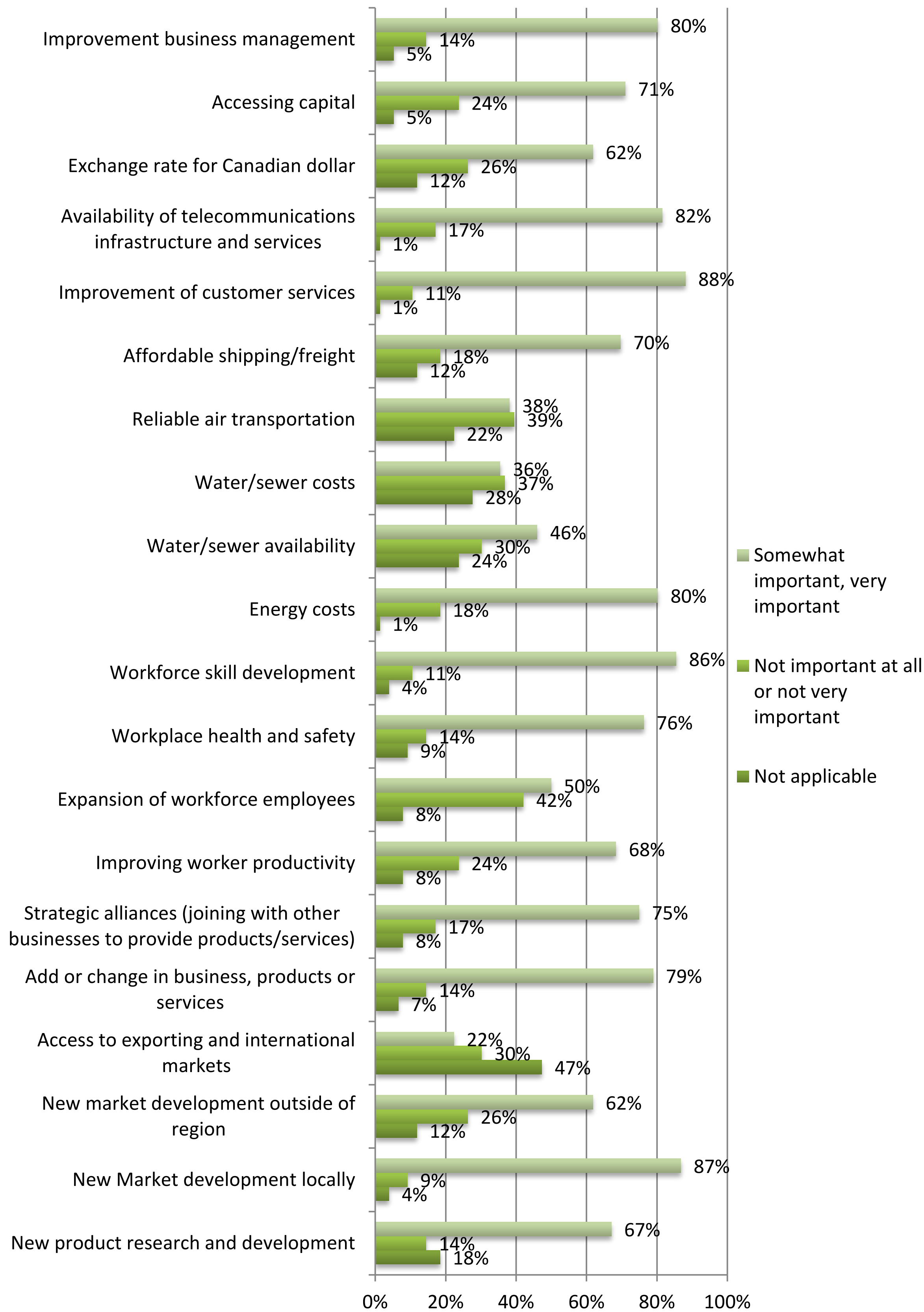


Figure 74 percentages are out of 76 respondent businesses that completed the region specific questions

When asked to rate their business' performance on a list of productivity drivers, the drivers that received the highest number of excellent or good ratings included leadership and management capacity (79%) and productive workplace culture (79%). The factors that received the highest number of fair or poor ratings included networking and collaboration (39%) and measuring impacts of productivity efforts/investments (38%).

Figure 75: Performance on key productivity drivers

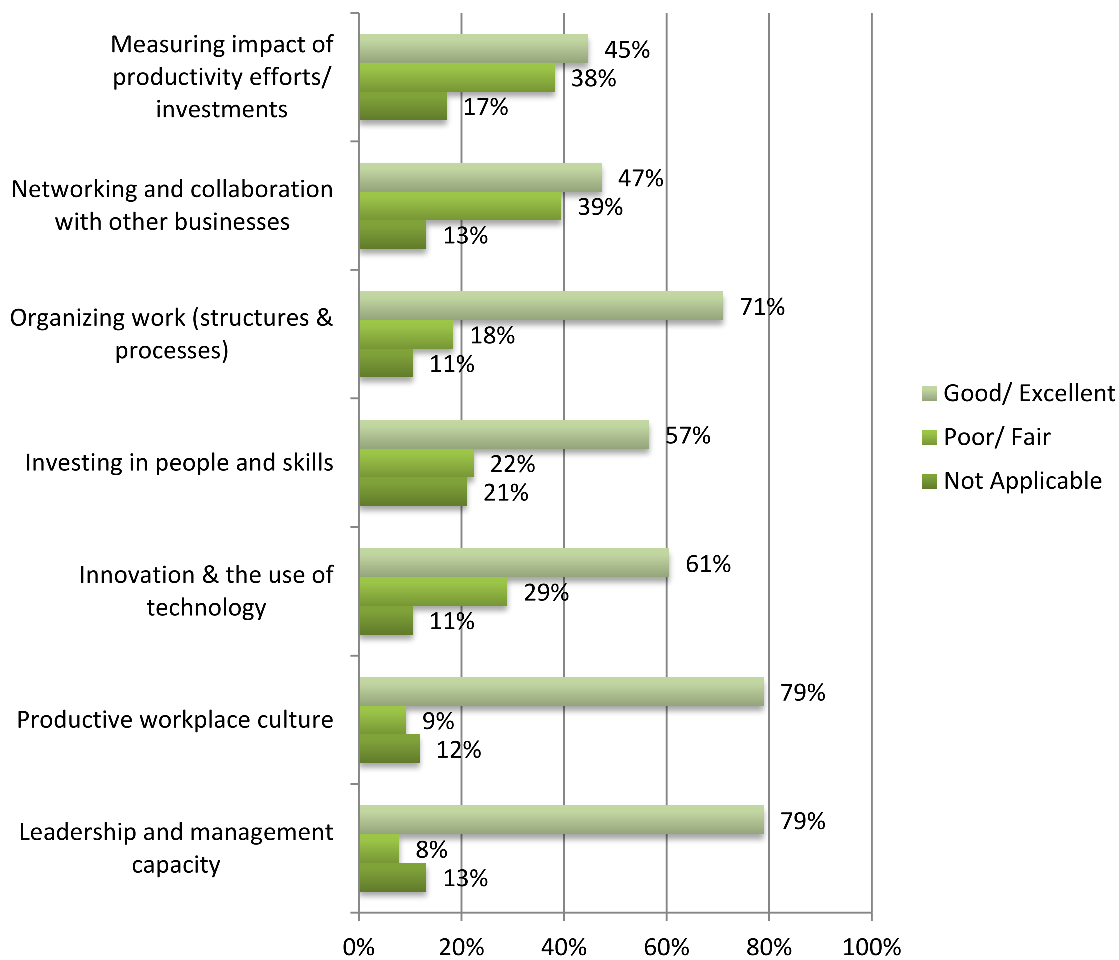


Figure 75 percentages are out of 76 respondent businesses that completed the region specific questions

Economic Drivers

Respondents believe the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (61%) relocation of people from urban centres (39%), and arts, culture and creative businesses (37%). Notably, no respondents chose finance and government as economic drivers with growth potential.

Figure 76: Economic drivers with greatest growth potential

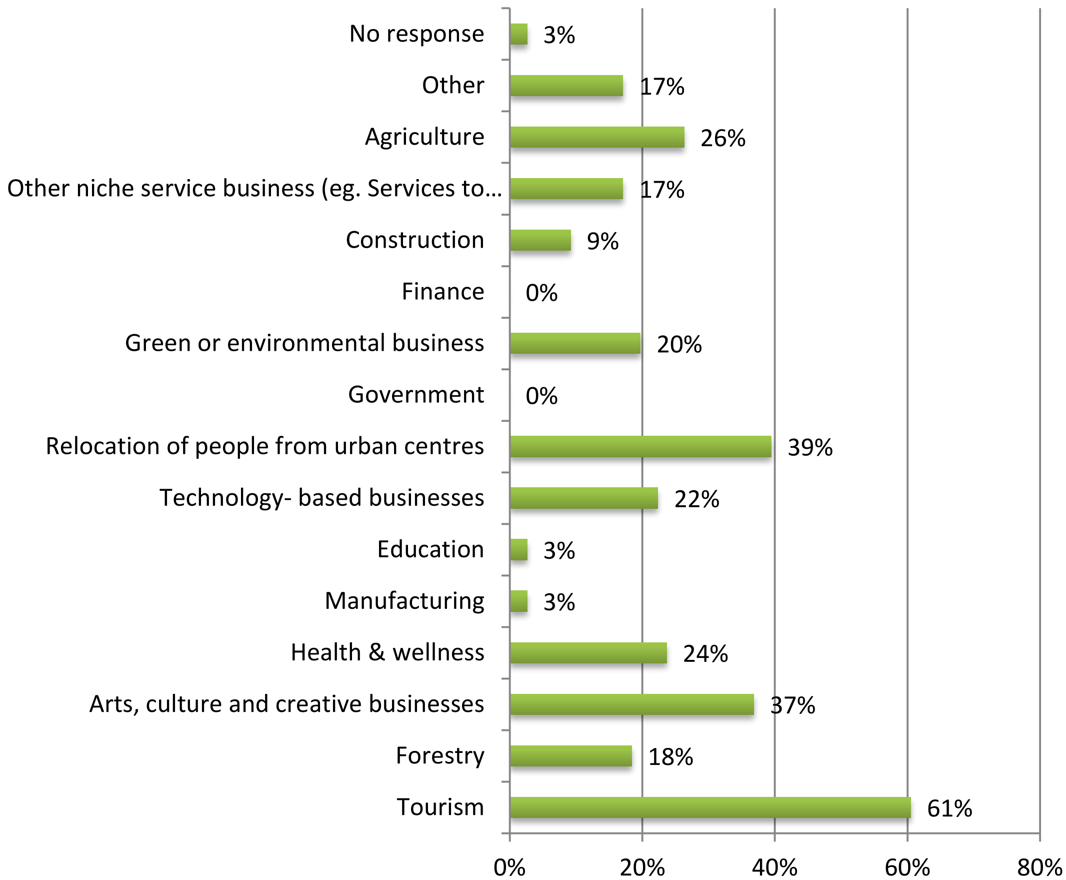


Figure 76 percentages are out of 76 respondent businesses that completed the region specific questions

Assessment and Plans

Overall Health

The highest number of respondents reported that their company is in overall good health (38%), 13% reported that their company's health is excellent and 18% reported that it is fair. Only 6% of respondents indicated that their company is in poor health.

Figure 77: Company's overall health

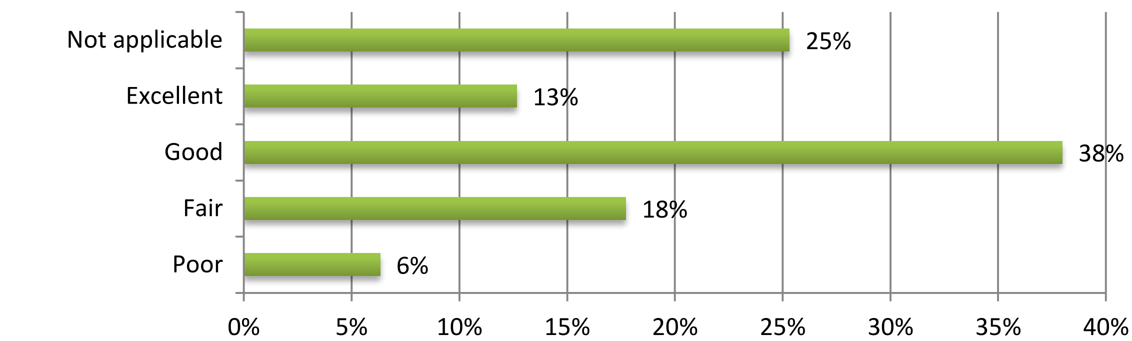


Figure 77 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Most respondent businesses with a parent company indicated that the health of that parent company is either excellent (4% of respondents) or good (4% of respondents).

Figure 78: Overall health of parent company

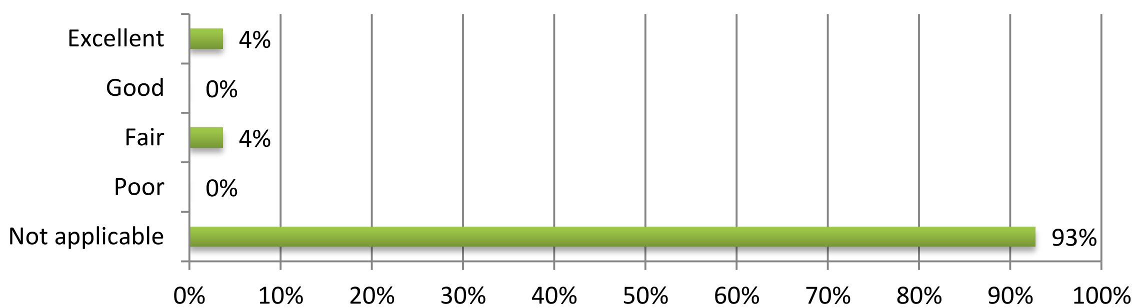
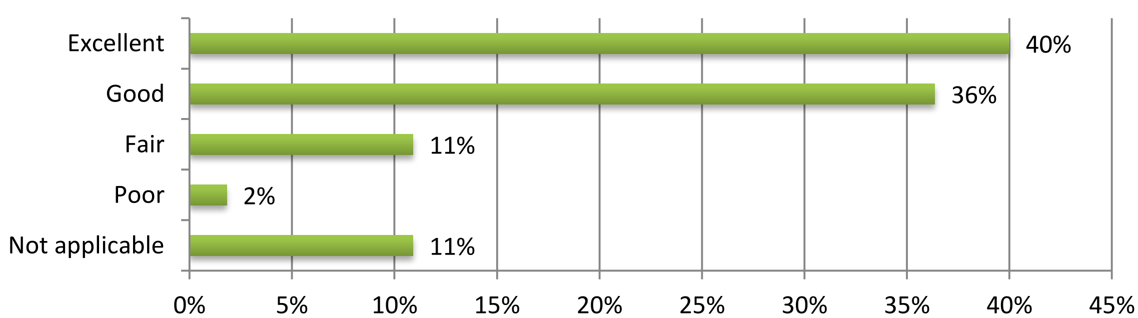


Figure 78 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Attitude toward Community

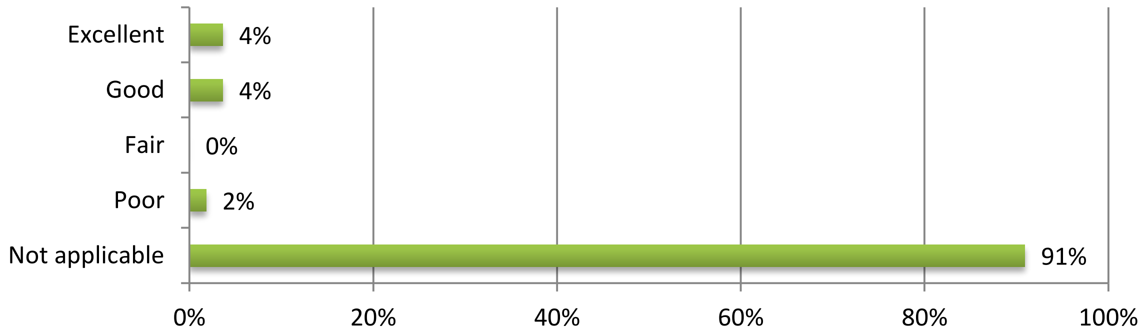
Forty percent of respondents indicated that their local management's attitude toward the community is excellent and 36% indicated that it is good.

Figure 79: Local management's attitude toward community



Four percent of respondents indicated their parent company's attitude toward the local community is excellent or good, 2% indicated it was poor.

Figure 80: Parent company's attitude toward local community

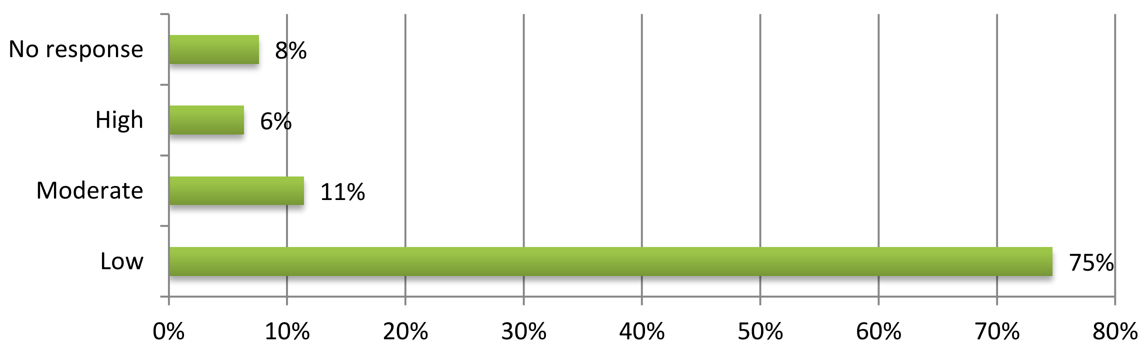


Figures 79 and 80 percentages are out of 55 respondent businesses that completed the BRE Long Survey

Risk of Closing or Downsizing

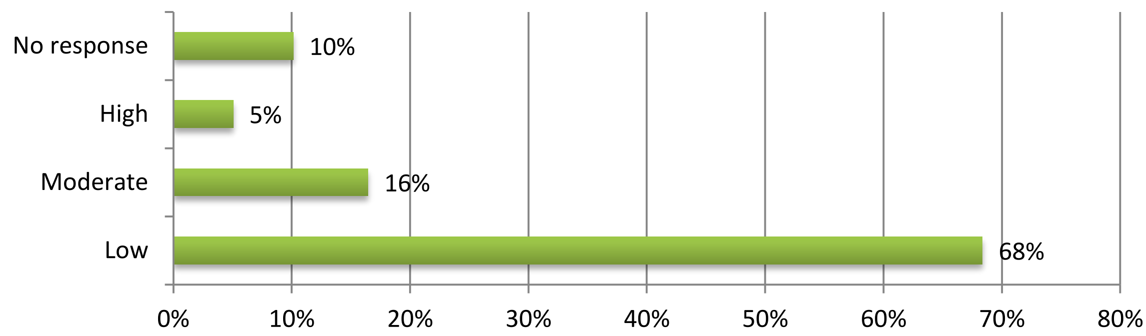
Data indicate that the risk of Slocan Valley businesses closing or downsizing is low. Only 6% of respondents reported that they are at a high risk of closing in the next 1-3 years.

Figure 81: Risk of facility closing



Five percent of respondents indicated that they are at a high risk of downsizing.

Figure 82: Risk of facility downsizing



Figures 81 and 82 percentages are out of 79 respondent businesses that completed the BRE Long or Short Survey

Recommendations

Next Steps

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

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

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

Many BRE actions also lead to long-term programs (e.g., a 'Buy Local' program), or ongoing plans and policies. Patience and a commitment over the long-term are critical in determining the success of these initiatives. For this reason, BRE should be thought of, and implemented as, a 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 support links to planning and action:

1. Prepare a follow-up report compiling current research findings alongside other relevant regional economic development research to identify common themes and further develop recommended actions.
2. Host a business stakeholder forum to present findings and prioritize actions. Host a facilitated action planning session with economic development stakeholders and industry representatives.
3. Host a facilitated action planning session with economic development stakeholders and industry representatives.
4. Based on results from the forums and 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.
5. Establish a monitoring program to assess the impact of implementation efforts.

Potential Action Areas

Business Expansion

Businesses in the region are planning significant investment (over $6.6 million) in expansion over the next three years. Data indicate that about equal numbers of businesses are focusing their expansion budgets on either technology or real estate. Nine businesses (11%) stated that they will be seeking a new site to accommodate their planned expansion and all nine indicated that a lack of suitable premises is actually preventing them from expanding. Results therefore suggest that Slocan Valley businesses could benefit from expansion assistance and, in particular, specific support targeted at real estate and land use. Actions on this theme could involve assisting businesses in locating potential expansion sites.

Training

A lack of skilled staff was commonly cited as a barrier to expansion of businesses and the vast majority of respondents said that workforce skill development is important to the competitiveness of their business. Data therefore indicate that there are opportunities to support businesses through workforce training and professional development. Key training areas most often listed by businesses include business/ management and accounting, marketing/ sales, and first aid/ safety. Uptake on training opportunities can be low in the region due to the limited time and financial resources available to small businesses. Therefore, actions on this theme may be best received if they are adaptive, flexible and, in some cases, subsidized. Respondents indicated they prefer classroom or seminar based training (47%) or individual coaching (40%). Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Workforce Recruitment and Retention

Respondents report they are experiencing challenges with both recruiting and retaining employees. Businesses perceive that the seasonal nature of many jobs and the lack of full time positions contribute to challenges with employee retention. Among local businesses, the most challenging positions for recruitment include machine operators, general labourers and administrative/clerical personnel. Since half of respondents acknowledged that expansion of the workforce is important to their company's competitiveness, providing recruitment support to businesses may help improve the area's economic climate. Currently, respondents primarily recruit locally through word of mouth, help wanted signs and local newspaper advertising. Actions on this theme could therefore involve assisting businesses with recruiting further afield and through non-traditional channels, either individually or as a business community. There is also the potential for seasonal businesses operating at different times of the year to work together to provide more stable employment for their employees throughout the year.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only five percent of respondents indicated that they have a formal succession plan and over a third do not have an up-to-date business plan. Furthermore, business and management training were among the most often cited areas of training needs. Data therefore suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a more targeted, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to 'at-risk' businesses. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses.

Infrastructure and Transportation

Lack of infrastructure such as telecommunications sewer, and waste disposal services was repeatedly cited as a barrier to new business development and regional growth. Eighty two percent of respondents agreed that availability of telecommunications infrastructure and services was important to their business' competiveness and fifty-six percent rated the government's provision of telecommunications services as poor, fair or average. Lack of infrastructure including telecommunications and sewers was the most commonly cited barrier to growth (mentioned by 17% of respondents). Transportation and shipping infrastructure were also often mentioned as important areas for improvement. Thirty-three percent of respondents listed transportation among the most critical issues for their employees, Transportation and shipping costs and logistics were cited by 7% of respondents as one of the communities main weaknesses and was cited by 8% of respondents as a barrier to growth In the community. Actions on this theme could include support for more research in partnership with local governments, communities, service organizations and neighbouring communities into the development of telecommunications and transportation infrastructure and services in the Slocan Valley.

Attitudes toward Growth

A perceived resistance to change or growth among residents was among the most commonly cited barriers to new business development or growth. The Slocan Valley economic development community may consider hosting a forum focused on planning for growth and infrastructure development to engage community members in the process of visioning for future growth and development.

Appendix A: Data Tables

Company Information

Figure 1: Industry Classification		
Agriculture, Forestry, Fishing and Hunting	4	7%
Mining	1	2%
Construction	3	5%
Manufacturing	13	22%
Retail Trade	14	23%
Transportation and Warehousing	1	2%
Information	1	2%
Finance and Insurance	1	2%
Real Estate Rental and Leasing	2	3%
Professional, Scientific and Technical Services	4	7%
Education Services	1	2%
Health Care and Social Assistance	3	5%
Arts, Entertainment and Recreation	4	7%
Accommodation and Food Services	7	12%
Other Services (Except Public Administration)	1	2%
Total:	60	100%

Figure 2: Facility Functions		
Distribution	11	20%
Engineering / R&D	7	13%
Headquarters	8	15%
Manufacturing	12	22%
Services	21	38%
Warehousing	6	11%
No Response	28	51%
Total BRE Long Survey Respondents	55	

Figure 3: Location of Competitors		
Local / Regional	28	51%
Elsewhere BC	5	9%
National	7	13%
International	6	11%
Online	0	0%
None	5	9%
No Response	4	7%
Total BRE Long Survey Respondents	55	100%

Figure 4: Business Success Factors

None/ No answer	15	27%
Lifestyle / family friendly	4	7%
Location / proximity to markets	14	25%
Affordability / pricing	4	7%
Workforce	5	9%
Technology / R&D	2	4%
Product Quality & Selection / Innovative products	17	31%
Diversity/ Flexibility / Customization	1	2%
Customer service / Reputation / Referrals	10	18%
Experience / Length of time in business	4	7%
Lack of competition / High market demand / Customer base	10	18%
Infrastructure / Facilities / Equipment	5	9%
Proximity to / Quality of Supply	2	4%
Other	11	20%
Total BRE Long Survey Respondents	55	100%

Figure 5: Another Canadian Location		
Yes	6	11%
No	16	29%
No Answer	33	60%
Total BRE Long Survey Respondents	55	100%

Figure 5: Another International Location		
Yes	1	2%
No	29	53%
No Answer	24	44%
Total BRE Long Survey Respondents	55	100%

Figure 6: Life Cycle Stage		
None/ No Response	2	3%
Emerging	11	14%
Growing	36	46%
Maturing (Status Quo)	24	30%
Declining	6	8%
Total BRE Long and Short Survey Respondents	79	100%

Figure 7: Length of Time in Business		
No Response	10	13%
less than 1 year	3	4%
1-4 years	7	9%
5-9 years	21	27%
10-19 years	13	16%
more than 20 years	25	32%

Total BRE Long and Short Survey Respondents	79	100%

Figure 8: Type of Business		
No Response	1	1%
Sole Proprietorship	27	34%
Partnership	13	16%
Corporation	29	37%
Limited Liability Partnership	1	1%
Non-Profit	3	4%
Other	5	6%
Total BRE Long and Short Survey Respondents	79	100%

Figure 9: Location of Headquarters		
No Response	40	73%
In Region	0	0%
In Province	12	22%
Elsewhere in Canada	3	5%
Elsewhere in world	0	0%
Total BRE Long Survey Respondents	55	100%

Figure 10: Ownership & Management Changes		
Ownership change in last 5 years	7	13%
No ownership change in last 5 years	47	85%
No response	1	2%
Management change in last 5 years	9	16%
No management change in last 5 years	40	73%
No response	6	11%
Total BRE Long Survey Respondents	55	100%

Pending ownership change		
Pending ownership change	17	22%
Not pending ownership change	59	75%
No response	3	4%
Total BRE Long and Short Survey Respondents	79	100%

Impact of Management Change		
Negative	0	0%
Positive	7	78%
Neutral	2	22%
Total Respondents who Experienced a Management Change	9	100%

Impact of Ownership Change		
Negative	0	0%
Positive	5	71%

Neutral	2	29%
Total Respondents who Experienced an Ownership Change	7	100%

Figure 11: Ownership Change Timeline		
1 year or less	2	12%
2 years	3	18%
3 years or more	12	71%
Total Respondents with a Pending Ownership Change	17	100%

Figure 12: Anticipated Exit Strategy		
Family sale / transfer	1	6%
Non-family sale / transfer	10	59%
Another company sale / transfer	3	18%
Close business	1	6%
Other	2	12%
Total Respondents with a Pending Ownership Change	17	100%

Successor Identified		
Yes	3	4%
No	42	53%
No response	34	43%
Total BRE Long and Short Survey Respondents	79	100%

Figure 13: Formal Succession Plan		
Yes	4	5%
No	36	46%
N/A	39	49%
Total BRE Long and Short Survey Respondents	79	100%

Figure 14: Current Business Plan		
Yes	32	58%
No	16	29%
No response	31	56%
Total BRE Long Survey Respondents	55	100%

Local Workforce

Figure 15: Total Number of Employees		
0 or no answer	17	22%
Less than 5	29	37%
5-9	22	28%
10-19	8	10%
20-49	3	4%
50-99	0	0%

Over 100	0	0%
Total BRE Long and Short Survey Respondents	79	100%

Figure 16: Nature of Employment		
Temporary	91	22%
Part Time	137	33%
Full Time	181	44%
Total employees	409	100%

Figure 17. Employment Trend Over Last 10 Years		
Decreasing	13	16%
Staying the Same	23	29%
Increasing	19	24%
No Response	24	30%
Total BRE Long and Short Survey Respondents	79	100%

Figure 18: Projected Employees in Three Years		
No response	22	28%
0	6	8%
Less than 5	19	24%
5-9	18	23%
10-19	9	11%
20-49	4	5%
50-99	1	1%
100 and over	0	0%
Total BRE Long and Short Survey Respondents	79	100%

Figure 19: Change in full time staff over last 3 years		
No response	12	22%
Increased	12	22%
Stayed the same	26	47%
Decreased	5	9%
Total BRE Long Survey Respondents	55	100%

Figure 20: Full-Time Employment Trend Over Next 3 Years		
No response	17	31%
Will Decrease	3	5%
Stay the Same	24	44%
Will Increase	11	20%
Total BRE Long Survey Respondents	55	100%

Figure 21: Age of Essential Employees		
No response	13	16%

Less than 25 years	7	9%
26 to 34 years	9	11%
35 to 49 years	28	35%
50 years or older	22	28%
Total BRE Long and Short Survey Respondents	79	100%

Figure 22: Wage in Relation to Other Businesses in Region		
No response	23	42%
Less than	2	4%
Same	19	35%
Greater than	11	20%
Total BRE Long Survey Respondents	55	100%

Average hourly wage: Skilled / Professional		
No response	32	58%
Under $20	9	16%
$20 - $29	10	18%
$30 - $49	4	7%
$50 or more	0	0%
Total BRE Long Survey Respondents	55	100%

Average hourly wage: Semi-skilled		
No response	39	71%
Under $20	12	22%
$20 - $29	3	5%
$30 - $49	1	2%
$50 or more	0	0%
Total BRE Long Survey Respondents	55	100%

Average hourly wage: Entry- level		
No response	37	67%
$10 - $12	15	27%
$13 - $15	2	4%
$15-$20	1	2%
Total BRE Long Survey Respondents	55	100%

Figure 23: Trend in Unfilled Positions		
No response	24	44%
Decreasing	1	2%
Staying the Same	26	47%
Increasing	4	7%
Total BRE Long Survey Respondents	55	100%

Training Budget		
No response	11	20%
Yes	20	36%
No	24	44%
Total BRE Long Survey Respondents	55	100%

Figure 24: Location of Workforce Recruitment		
No response	8	15%
Local	45	82%
Provincial	0	0%
National	1	2%
International	1	2%
Total BRE Long Survey Respondents	55	100%

Figure 25: Retention Challenges		
No response	15	19%
Yes	28	35%
No	36	46%
Total BRE Long and Short Survey Respondents	79	100%

Figure 25: Recruitment Challenges		
No response	17	22%
Yes	27	34%
No	35	44%
Total BRE Long and Short Survey Respondents	79	100%

Figure 26: Employee Retention Efforts		
Monetary incentives, wages and bonuses	6	11%
Benefits and perks	7	13%
Culture of respect and recognition	5	9%
Flex hrs	6	11%
Training	6	11%
Staff appreciation events	2	4%
Good work environment and relationships	8	15%
Other	2	4%
None	2	4%
Challenges mentioned	9	16%
No response	23	42%
Total BRE Long Survey Respondents	55	100%

Recruitment Activities		
Job Fairs/ Recruitment specialists/	1	2%
Through connections to industry	4	7%

Through schools/ Universities/ Colleges/ trades	2	4%
Newspaper Advertising	14	25%
through youth hiring programs	3	5%
Websites/ social media,	9	16%
Word of mouth	16	29%
Other	3	5%
None	13	24%
No Response	10	18%
Total BRE Long Survey Respondents	55	100%

Figure 27: Current Recruitment Areas		
Administration / clerical	4	15%
Advanced manufacturing workers	0	0%
Agriculture / farming	1	4%
Assembler / line workers	1	4%
CDL drivers	0	0%
Construction / contractors	0	0%
Electrical / electronics	0	0%
Food / beverage service	2	7%
General labourer	5	19%
Graphic arts / printing	0	0%
Healthcare professionals	2	7%
Hospitality service	0	0%
Machine operators	5	19%
Machinists	1	4%
Maintenance	0	0%
Manufacturing other	2	7%
Marketing	0	0%
Material / fabricators	2	7%
Mechanics	1	4%
Plant managers / operators	1	4%
Professionals / information techs / programming	1	4%
Professional other	1	4%
Professional / technical	1	4%
Sales / retail	2	7%
Sales / service	2	7%
Engineers	0	0%
Hairdressers / Stylists	0	0%
Other	11	41%
Total Respondents Experiencing Recruitment Challenges	27	100%

Responses to Other and Professional / Other for Current Recruitment Areas
Staff with service and communication skills

Teachers
Managers
Drafting skills
Drivers
Food Processing skills

Figure 28: Future Recruitment Areas		
Admin/clerical	1	3%
Advanced mfg workers	0	0%
Agriculture / farming	1	3%
Assembly/line workers	0	0%
CDL drivers	0	0%
Construction/contractors	0	0%
Electrical/electronics	0	0%
Food/beverage service	2	6%
General labourer	2	6%
Graphic arts/printing	0	0%
Healthcare professionals	2	6%
Hospitality service	0	0%
Machine operators	3	10%
Maintenance	1	3%
Manufacturing other	1	3%
Marketing	1	3%
Material/fabricators	0	0%
Mechanics	1	3%
Plant managers/operators	0	0%
Prof/info tech/programming	1	3%
Professional other	1	3%
Professional technical	1	3%
Sales/retail	7	23%
Sales/service	3	10%
Engineers	0	0%
Hairdressers / stylists	0	0%
Other	8	26%
No response	2	6%
Total respondents anticipating future recruitment difficulties	31	100%

Responses to Other and Professional Other for Future Recruitment Areas
Trades people
Early childhood educators
Food processers
Computer technicians

Figure 29: Skill Level of Majority of Workforce (50%-100% of workforce)

Skilled / Professional	20	36%
Semi-Skilled	7	13%
Entry-Level	7	13%
Total BRE Long Survey Respondents	55	100%

Skilled / Professional Employees as % of Workforce		
No Answer	25	45%
less than 25%	2	4%
25 to 49%	8	15%
50 to 74%	5	9%
75 to 100%	15	27%
Total BRE Long Survey Respondents	55	100%

Semi-Skilled Employees as % of Workforce		
No Answer	36	65%
less than 25%	6	11%
25 to 49%	6	11%
50 to 74%	4	7%
75 to 100%	3	5%
Total BRE Long Survey Respondents	55	100%

Entry-Level Employees as % of Workforce		
No Answer	37	67%
less than 25%	5	9%
25 to 49%	6	11%
50 to 74%	2	4%
75 to 100%	5	9%
Total BRE Long Survey Respondents	55	100%

Training Budget		
No response	11	20%
Yes	20	36%
No	24	44%
Total BRE Long Survey Respondents	55	100%

Are there areas of training or professional development that would be of benefit to you or your employees?		
Yes	59	75%
No	14	18%
No response	6	8%
Total BRE Long and Short Survey Respondents	79	100%

Figure 30: Professional Development Needs

Administrative / Computer Skills	3	5%
Technology Skills	3	5%
Trades	4	7%
Equipment Operators	5	8%
Retail / Hospitality / Customer Service	5	8%
WHMIS / Food Safe	6	10%
First Aid/ Safety	9	15%
Business / Management & Accounting	15	25%
Operations / Processes	1	2%
Marketing / Sales	9	15%
Other	23	39%
No response	1	2%
Total respondents reporting areas of training that would be beneficial	59	100%

Figure 31: Preferred Modes of Training		
Classroom / Seminars	26	47%
Individual Coaching	22	40%
Online / Webinar Training	18	33%
Apprenticeship	0	0%
Trade Shows	1	2%
Other	10	18%
No response	9	16%
Total BRE Long Survey Respondents	55	100%

Figure 32: Usual Training Locations		
Local	19	35%
Regional	21	38%
Provincial	15	27%
National	4	7%
United States	3	5%
No response	12	22%
Total Respondents	55	100%

Figure 33: Critical Issues for Employees		
Housing	22	29%
Cost of living	40	53%
Transportation	25	33%
Childcare	14	18%
Other	25	33%
No response	11	14%
Total respondents	76	100%

Responses to “Other” for Critical Issues for Employees		
Job Security	6	24%
Wages	6	24%
Availability of full time hours/ work	7	28%
Community involvement	2	8%
Availability of reliable telecommunications	2	8%
Good work environment	2	8%
Training	1	4%
Lifestyle	1	4%
Total respondents "other"	25	

Location of Employees						
	In Community		Elsewhere in Region		Outside of Region	
No response	13	17%	67	88%	71	93%
0-24%	0	0%	5	7%	2	3%
25-49%	2	3%	1	1%	2	3%
50-74%	2	3%	1	1%	1	1%
75-100%	59	78%	2	3%	0	0%
Total responses:	76	100%	76	100%	76	100%

SALES

Figure 34: Annual Sales		
Under $100,000	5	6%
$100,000 to $499,999	6	8%
$500,000 to $999,999	2	3%
$1million to $4.99 million	7	9%
over $5 million	2	3%
Confidential/ no response	57	72%
Total	79	100%

Figure 35: Status of Market		
Decreasing	8	10%
Stable	25	32%
Increasing	43	54%
No response	3	4%
Total	79	100%

Figure 36: Market Share in Comparison to Competitors		
Decreasing	3	5%
Stable	9	16%
Increasing	24	44%
No response	19	35%
Total BRE Long Survey Respondents	55	100%

Figure 37: Projected Sales Growth in Upcoming Year		
Declining	3	4%
0%	10	13%
1-9%	16	20%
10-24%	27	34%
25-49%	9	11%
50-99%	5	6%
100% or more	4	5%
No response	5	6%
Total	79	100%

Figure 38: Historical Sales Trend (at this Location)		
Decreasing	7	13%
Stable	9	16%
Increasing	33	60%
Not applicable/ no response	25	45%
Total BRE Long Survey Respondents	55	100%

Figure 39: Historical Sales Trend (at the Parent Company)		
Decreasing	4	7%
Stable	1	2%
Increasing	2	4%
Not Applicable/ no response	48	87%
Total BRE Long Survey Respondents	55	100%

Figure 40: Historical Sales Trend (within the Industry)		
Decreasing	38	69%
Stable	5	9%
Increasing	12	22%
Not Applicable/ no response	14	25%
Total BRE Long Survey Respondents	55	100%

Figure 41: Historical Export Sales Trend		
Declining	3	5%
Staying the Same	1	2%
Increasing	3	5%
Not Applicable/ no response	48	87%
Total BRE Long Survey Respondents	55	100%

Figure 42: Sales Generated by Top 3 Customers		
1-9%	28	35%
10-25%	14	18%

26-50%	11	14%
51-75%	9	11%
76-100%	6	8%
No response	11	14%
Total BRE Long and Short Survey Respondents	79	100%

Figure 43: Geographic Source of Majority of Sales		
Local	58	73%
Provincial	4	5%
National	5	6%
United States	1	1%
International	2	3%
Total BRE Long and Short Survey Respondents	79	100%

Source of Sales (Local/Regional)		
0% or no answer	10	13%
under 50%	11	14%
50-99%	26	33%
100%	32	41%
Total	79	100%

Source of Sales (Provincial)		
0% or no answer	48	61%
under 50%	27	34%
50-99%	4	5%
100%	0	0%
Total	79	100%

Source of Sales (National)		
0% or no answer	49	62%
under 50%	25	32%
50-99%	3	4%
100%	2	3%
Total	79	100%

Source of Sales (United States)		
0% or no answer	59	75%
under 50%	19	24%
50-99%	1	1%
100%	0	0%
Total	79	100%

Source of Sales (International)

0% or no answer	61	77%
under 50%	16	20%
50-99%	2	3%
100%	0	0%
Total	79	100%

Figure 44: International Trade Status		
Import	3	5%
Export	5	9%
None/ not applicable	10	18%
No response	40	73%
Total BRE Long Survey Respondents	55	100%

Figure 45: Participation in Government Procurement		
Yes	14	25%
No	31	56%
No response	10	18%
Total BRE Long Survey Respondents	55	100%

Figure 46: Source of Majority of Supplies		
Local/ Regional	29	37%
Provincial	28	35%
National	12	15%
United States	2	3%
International	2	3%
Total BRE Long and Short Survey Respondents:	79	100%

Source of Supplies (Local/Regional)		
0% or no answer	21	27%
under 50%	29	37%
50-99%	19	24%
100%	10	13%
Total	79	100%

Source of Supplies (Provincial)		
0% or no answer	31	39%
under 50%	20	25%
50-99%	26	33%
100%	2	3%
Total	79	100%

Source of Supplies (National)		
0% or no answer	44	56%
under 50%	23	29%

50-99%	9	11%
100%	3	4%
Total	79	100%

Source of Supplies (United States)		
0% or no answer	63	80%
under 50%	14	18%
50-99%	1	1%
100%	1	1%
Total	79	100%

Source of Sales (International)		
0% or no answer	67	85%
under 50%	8	10%
50-99%	4	5%
100%	0	0%
Total	79	100%

Figure 47: Reason for Out of Area Purchasing		
Product not available here	39	51%
Higher costs locally	19	25%
Long term contract with supplier/ loyalty to supplier	6	8%
Unaware of local vendors	2	3%
No control/ head office decision	1	1%
Quality of available product	11	14%
Other	4	5%
No response	27	36%
Total Respondents	76	100%

Facilities and Equipment

Figure 48: Facility Size		
less than 1000 sq ft	14	25%
1000-4999 sq ft	11	20%
5000-9999 sq ft	5	9%
10,000-19,999 sq ft	5	9%
20,000 sq ft or more	6	11%
No response	14	25%
Total BRE Long Survey Respondents	55	100%

Figure 49: Condition of Facility		
Excellent	23	29%

Good	37	47%
Fair	11	14%
Poor	4	5%
No response	4	5%
Total Respondents	79	100%

Figure 50: Condition of Equipment		
Excellent	19	24%
Good	45	57%
Fair	12	15%
Poor	0	0%
No response	3	4%
Total Respondents	79	100%

Figure 51: Number of Shifts		
One shift	32	58%
Two shifts	7	13%
24 hours	4	7%
Other	8	15%
No response	4	7%
Total BRE Long Survey Respondents	55	100%

Figure 52: Ownership Status		
Leased	43	78%
Owned	12	22%
Total BRE Long Survey Respondents	55	100%

Figure 53: Length of Time Remaining on Lease		
Less than 1 yr	3	25%
1-2 yrs	1	8%
3-5 yrs	2	17%
More than 5 yrs	2	17%
No response	4	33%
Total Respondents Leasing Facility	12	100%

Planning to renew current lease		
Yes	15	27%
No	1	2%
No response	39	71%
Total BRE Long Survey Respondents	55	100%

Figure 54: Investment in Facility (Past 18 months)

Increasing	14	25%
Staying the same	20	36%
Decreasing	0	0%
No response	21	38%
Total BRE Long Survey Respondents	55	100%

Figure 55: Investment in Equipment (Past 18 months)		
Increasing	11	20%
Staying the same	19	35%
Decreasing	0	0%
No response	25	45%
Total BRE Long Survey Respondents	55	100%

Figure 56: Expansion Plans		
Yes	36	46%
No	29	37%
No response	14	18%
Total Respondents	79	100%

Figure 57: Adequacy of Current Site for Expansion		
Yes	26	33%
No	9	11%
Maybe	10	13%
No response	34	43%
Total Respondents	79	100%

Figure 58: Estimated Total Investment in Expansion		
Less than $25,000	1	2%
$25,000-$99,999	1	2%
$100,000-$499,999	4	7%
$500,000-$999,999	0	0%
$1-$4.9 million	3	5%
$5-$9.9 million	0	0%
$10-19.9 million	0	0%
$20 million and over	0	0%
No response	46	84%
Total BRE Long Survey Respondents	55	100%

Figure 59: Expansion Budget for Equipment & Technology		
0%	0	0%
under 50%	5	9%
50 to 99%	2	4%

100%	2	4%
No response	46	84%
Total BRE Long Survey Respondents	55	100%

Figure 60: Expansion Budget for Real Estate		
0%	3	5%
under 50%	2	4%
50 to 99%	4	7%
100%	0	0%
No response	46	84%
Total BRE Long Survey Respondents	55	100%

Figure 61: Size of Facility Expansion		
20,000 sq ft or more	1	2%
10,000-19,999 sq ft	1	2%
5,000-9,999 sq ft	1	2%
1,000 to 4,999 sq ft	5	9%
Less than 1,000 sq ft	3	5%
No response	44	80%
Total BRE Long Survey Respondents	55	100%

Figure 62: Barriers to Expansion		
Identifying / Accessing New Markets	14	18%
Broadband access	1	1%
Lack of Suitable Premises	9	11%
Problems with Development Approvals	7	9%
Transport / Freight	2	3%
Energy Costs	3	4%
Energy reliability	0	0%
Financing	15	19%
Lack of Skilled Staff	6	8%
Local Regulations (Zoning)	6	8%
Roads	2	3%
Warehousing	1	1%
Transport/ Freight	2	3%
Real Estate Costs	0	0%
No response	41	52%
Unique respondents:	38	48%
Total BRE Short and Long Survey Respondents	79	100%

Sought Expansion Assistance		
No	25	45%

Yes	12	22%
No response	18	33%
Total BRE Long Survey Respondents	55	100%

Figure 63: Expansion Assistance from Support Organization		
Provincial Government	2	3%
Community Futures	1	25%
CBT / Business Basin Advisors	1	1%
Banks - other	1	11%
Selkirk College / School District	1	1%
Other	4	5%
No response	70	89%
Unique respondents	9	11%
Total Respondents	79	100%

Figure 64: Energy Efficiency Considerations in Expansion Plans		
No	5	9%
Yes	18	33%
No response	32	58%
Total BRE Long Survey Respondents	55	100%

Figure 65: Awareness of BC Hydro Power Smart		
Yes	29	53%
No	8	15%
No response	18	33%
Total BRE Long Survey Respondents	55	100%

Government Services

Figure 66: Rating of Government Services

	Not Applicable		Poor		Fair		Average		Good		Excellent		Total Respondents
Access to airport facilities	14	18%	19	24%	26	33%	0	0%	14	18%	6	8%	79
Access to highway/ roads	7	9%	4	5%	13	16%	0	0%	31	39%	24	30%	79
Access to Markets	7	9%	8	10%	28	35%	0	0%	27	34%	9	11%	79
Access to suppliers	7	9%	9	11%	29	37%	0	0%	26	33%	8	10%	79
Availability of road transport services	16	20%	9	11%	18	23%	0	0%	26	33%	10	13%	79
Availability of rail transport	54	68%	23	29%	1	1%	0	0%	0	0%	1	1%	79

Availability of warehousing	52	66%	17	22%	6	8%	0	0%	4	5%	0	0%	79
Disposal of waste material	16	20%	13	16%	18	23%	0	0%	21	27%	11	14%	79
Recycling	9	11%	6	8%	14	18%	0	0%	33	42%	17	22%	79
Inspections /licensing	28	35%	8	10%	11	14%	0	0%	25	32%	7	9%	79
Development approval process	48	61%	7	9%	9	11%	1	1%	12	15%	2	3%	79
Telecommunications (internet, cell)	9	11%	20	25%	24	30%	0	0%	21	27%	5	6%	79
Availability of buildings for lease or purchase	40	51%	11	14%	15	19%	0	0%	9	11%	4	5%	79
Availability of appropriately zoned land	43	54%	10	13%	9	11%	0	0%	12	15%	5	6%	79
Water and sewerage supply	26	33%	9	11%	2	3%	0	0%	27	34%	15	19%	79

Business Climate

Figure 68: Business Climate Factors

Business Climate Factors	**Excellent**		**Good**		**Fair**		**Poor**		**Not applicable/ no response**	
Workforce Quality	7	9%	28	35%	25	32%	11	14%	8	10%
Workforce Availability	6	8%	16	20%	29	37%	20	25%	8	10%
Workforce Stability	4	5%	14	18%	31	39%	21	27%	9	11%
Local Government	10	13%	17	22%	25	32%	12	15%	15	19%
Local Tax Structure	6	8%	16	20%	28	35%	10	13%	19	24%
Provincial Tax Structure	1	1%	11	14%	31	39%	17	22%	19	24%
Workers Compensation Rates	5	6%	16	20%	20	25%	9	11%	29	37%
Economic Development	3	4%	13	16%	28	35%	21	27%	14	18%
Cultural / Recreational Amenities	16	20%	25	32%	23	29%	10	13%	5	6%
Housing	3	4%	15	19%	23	29%	28	35%	10	13%
K-12 Education	12	15%	38	48%	11	14%	7	9%	11	14%
Colleges / Universities	7	9%	30	38%	12	15%	11	14%	19	24%
Technical Training	4	5%	21	27%	17	22%	18	23%	19	24%
Overall Business Climate	3	4%	28	35%	32	41%	10	13%	6	8%
Total Respondents										79

Figure 69: Business Climate Today vs 5 Years Ago		
Better Today	24	30%
No Change	17	22%
Worse Today	27	34%
No Opinion	11	14%
Total Respondents	79	100%

Figure 70: Business Climate 5 Years from Today		
Will be Better	42	53%
No Change	18	23%
Will be Worse	5	6%
No Opinion	14	18%
Total Respondents	79	100%

Figure 71: Community's Strengths as a Place to do Business		
Beautiful natural environment/ remote location	13	24%
Access to quality supplies	3	5%
Lifestyle	6	11%
Healthy, safe and supportive community	12	22%
People: loyal customers, stable population	21	38%
Access to basic services/ government programs	2	4%
Local government support for small business	3	5%
cooperation among businesses/ good business relationships	4	7%
Affordable place to live	2	4%
Other	7	13%
No response	12	22%
Unique respondents	43	78%
Total BRE Long Survey Respondents	55	100%

Figure 72: Community's Weaknesses as a Place to do Business		
Low incomes/ lack of money	5	9%
Economy/ lack of growth	5	9%
Small and isolated population / market	15	27%
Limited workforce	2	4%
Lack of jobs	3	5%
Lack of infrastructure and reliable utilities (telecommunication/ electricity)	5	9%
Shipping/ transportation costs and logistics	4	7%
Difficulties with development process	3	5%
Lack of exploitable resources	2	4%
Lack of affordable housing	1	2%

Resistance to change/ mindsets of people	9	16%
Seasonal resident population/ tourism economy	4	7%
Other	5	9%
No response	13	24%
Unique respondents	42	76%
Total BRE Long Survey Respondents	55	100%

Barriers to Growth in Community		
Yes	75	95%
No	1	1%
No response	3	4%
Total	79	100%

Figure 73: Barriers to Growth in the Community		
Small population	13	17%
Lack of government support	5	7%
Lack of jobs/full time employment	7	9%
Lack of services (health, education/ childcare)	4	5%
Lack of infrastructure (telecommunications, sewer)	13	17%
Isolated location	10	13%
High cost of housing/ real estate	10	13%
Cost and availability of transportation (airport/ highways)	6	8%
Absentee landowners/ seasonal population/ tourists	6	8%
Resistance to growth/ change	10	13%
Lack of disposable income/ low wages	5	7%
Small workforce	6	8%
Lack of cooperation among businesses/ communities/ populations	4	5%
Lack of regional promotion	2	3%
Lack of economic activity/ industry in region	3	4%
Other	13	17%
Total respondents that identified barriers to growth	75	100%

There are Key Customers to Attract to the Region		
Yes	26	47%
No	11	20%
No response	18	33%
Total	55	100%

There are Key Suppliers to Attract to the Region		
Yes	22	40%

No	16	29%
No response	17	31%
Total	55	100%

Figure 74: Importance of Business Competitiveness Factors

	Not applicable		Not important at all or not very important		Somewhat important, very important		total respondents
New product research and development	14	18%	11	14%	51	67%	76
New Market development locally	3	4%	7	9%	66	87%	76
New market development outside of region	9	12%	20	26%	47	62%	76
Access to exporting and international markets	36	47%	23	30%	17	22%	76
Add or change in business, products or services	5	7%	11	14%	60	79%	76
Strategic alliances (joining with other businesses to provide products/services)	6	8%	13	17%	57	75%	76
Improving worker productivity	6	8%	18	24%	52	68%	76
Expansion of workforce employees	6	8%	32	42%	38	50%	76
Workplace health and safety	7	9%	11	14%	58	76%	76
Workforce skill development	3	4%	8	11%	65	86%	76
Energy costs	1	1%	14	18%	61	80%	76
Water/sewer availability	18	24%	23	30%	35	46%	76
Water/sewer costs	21	28%	28	37%	27	36%	76
Reliable air transportation	17	22%	30	39%	29	38%	76
Affordable shipping/freight	9	12%	14	18%	53	70%	76
Improvement of customer services	1	1%	8	11%	67	88%	76
Availability of telecommunications infrastructure and services	1	1%	13	17%	62	82%	76
Exchange rate for Canadian dollar	9	12%	20	26%	47	62%	76
Accessing capital	4	5%	18	24%	54	71%	76
Improvement business management	4	5%	11	14%	61	80%	76

Figure 75: Performance on Key Productivity Drivers

	Not Applicable		Poor/ Fair		Good/ Excellent		Total respondents
Leadership and management capacity	10	13%	6	8%	60	79%	76
Productive workplace culture	9	12%	7	9%	60	79%	76
Innovation & the use of technology	8	11%	22	29%	46	61%	76
Investing in people and skills	16	21%	17	22%	43	57%	76
Organizing work (structures & processes)	8	11%	14	18%	54	71%	76
Networking and collaboration with other businesses	10	13%	30	39%	36	47%	76
Measuring impact of productivity efforts/ investments	13	17%	29	38%	34	45%	76

Figure 76: Economic Drivers with Greatest Potential for Growth		
Tourism	46	61%
Forestry	14	18%
Arts, culture and creative businesses	28	37%
Health & wellness	18	24%
Manufacturing	2	3%
Education	2	3%
Technology- based businesses	17	22%
Relocation of people from urban centres	30	39%
Government	0	0%
Green or environmental business	15	20%
Finance	0	0%
Construction	7	9%
Other niche service business (eg. Services to seniors)	13	17%
Agriculture	20	26%
Other	13	17%
No response	2	3%
Unique respondents	74	97%
Total respondents	76	100%

Assessment and Plans

Figure 77: Company's Overall Health		
Poor	5	6%
Fair	14	18%
Good	30	38%
Excellent	10	13%
Not applicable	20	25%
Total:	79	100%

Figure 78: Parent Company Health		
Not applicable	51	93%
Poor	0	0%
Fair	2	4%
Good	0	0%
Excellent	2	4%
Total BRE Long Survey Respondents	55	100%

Figure 79: Local Management's Attitude Towards Community		
Not applicable	6	11%
Poor	1	2%
Fair	6	11%
Good	20	36%
Excellent	22	40%
Total BRE Long Survey Respondents	55	100%

Figure 80: Parent Company's Attitude Towards Community		
Not applicable	50	91%
Poor	1	2%
Fair	0	0%
Good	2	4%
Excellent	2	4%
Total BRE Long Survey Respondents	55	100%

Figure 81: Risk of Facility Closing		
Low	59	75%
Moderate	9	11%
High	5	6%
No response	6	8%
Total Respondents	79	100%

Figure 82: Risk of Facility Downsizing		
Low	54	68%
Moderate	13	16%
High	4	5%
No response	8	10%
Total Respondents	79	100%