



COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

*REPORT ON THE TOURISM SECTOR
FALL 2016*



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COLUMBIA BASIN
RDI
RURAL DEVELOPMENT INSTITUTE

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

EXECUTIVE SUMMARY

This report describes findings from Business Retention and Expansion (BRE) surveys conducted with businesses in the tourism sector within the Basin Boundary region between 2012 and 2016. 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. This BRE combines the results of 152 companies, presenting a regional perspective on the tourism sector.

KEY RESEARCH FINDINGS

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of tourism respondents came from Golden (23%), followed by Revelstoke (15%), Slocan Valley (9%), Nelson and area (9%), and Fernie and area (8%).
	Location was the most important factor for the business locating in a given area, as well in making their business successful.
	The vast majority of competition reported was coming from within the regional area.
	Most companies surveyed have been in business for over 20 years.
	Half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 4,071 employees.
	Employees are split between full-time (41%), part-time (35%), and temporary (24%).
	The majority of employers (87%) recruit their workforce locally.
	Safety / First Aid / Food Safe training were the areas most commonly (27%) listed as key areas for training or professional development.
	The most critical considerations for employees are the cost of living and housing.
Sales	Businesses indicated the market for their product/service is mostly stable (53%) or increasing (38%).
	43% of businesses report that the majority of their sales are to customers within the community or region.
	The most frequent reason for purchasing products or services outside of the area is that the product is not available locally.
Facilities and Equipment	70% of businesses own the facility in which they operate.
	Just under half of businesses plan to expand within 3 years, with the vast majority (85%) indicating that expansion will occur within the community.
	Top barriers to expansion are financing and local regulations.
Government Services	Top rated government services include access to highway/roads and access to markets. Services with the lowest ratings include airport facilities, telecommunications, and the development approval process.
	The Kelowna International Airport and the Calgary International Airport are the most used airport by local businesses in the tourism sector.
Business	The overall business climate was rated as good by most businesses, and the majority

Climate	of businesses believe that the business climate will improve over the next five years.
	Business climate factors that received the highest ratings include the Chamber of Commerce, the cultural and recreational amenities, and tourism services.
	Tourism and recreational suppliers were the most commonly cited as a potential supplier to the region, and similarly tourism related businesses were thought to be the industry that could be attracted to the region that would have the most strategic benefit to the industry.
	The business competitiveness factors that are most important to respondents include availability of telecommunications infrastructure and services, and improvement of customer service.
Assessment and Plans	The overall health of their company was rated as good by 54% of businesses and excellent by 23% of businesses.
	The majority of businesses rate their risk of closing or downsizing as low.

NEXT STEPS AND SUMMARY OF POTENTIAL ACTIONS

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

Workforce – Recruitment & Retention

Actions identified by respondents that could prove helpful include: improved job advertising, assistance with the foreign worker program, and supporting affordable housing. The hospitality and food/beverage service industries featured in areas of future and current recruitment challenges, as did the area of administrative/clerical. Related to recruitment and retention, are the critical considerations for employees identified which include the cost of living, housing, and transportation.

Youth Employment

Increasing youth employment may assist in addressing the recruitment challenges that 40% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Support could come in the form of assistance with navigating local regulations, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to expansion which include geographic isolation, difficulties with the development approval process, and general community resistance to change.

Small to Medium Sized and Independent Businesses

Tailoring supports and services to small/medium sized, independent businesses will benefit businesses in the tourism sector. Actions to support and encourage small and medium sized businesses could include specific training targeted to the needs of small businesses and an exploration of shared service provision in the areas of payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include promoting existing supports available from Small Business BC, Destination BC, Kootenay Rockies Tourism, and the Basin Business Advisors Program.

Supply Sourcing and Procurement

There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area businesses could also be explored. A regional stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Training

Future initiatives could include supporting networks to help businesses identify shared training needs, increasing awareness of new trends, technologies and changes in the tourism sector, and working with local educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses in the tourism sector. Any future business planning support initiatives should be aggressively advertised to ensure uptake among businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Continued Support for Tourism Sector

Actions to support the tourism industry could include continued collaboration between governments at all levels and local tourism agencies such as Destination British Columbia, Kootenay Rockies Tourism, local Destination Marketing Organisations, Chambers of Commerce, and local businesses. With most businesses (74%) expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Improving Connectivity

A recurring theme was the need to improve telecommunications services, with 26% of respondents rating the service as poor and 28% rating the service as fair. 93% of businesses rated the availability of telecommunications as somewhat important or very important to ensuring business competitiveness over the next five years. Discussions with telecommunication service providers and stakeholders such as the Columbia Basin Broadband Corporation to identify ways to

improve service, as well as community discussions to identify specific areas for improvements would be beneficial to target improvements that would support the tourism sector.

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PROJECT OVERVIEW

This report describes findings from Business Retention and Expansion (BRE) surveys of 152 businesses from across the Columbia Basin¹. These surveys were conducted between 2012 and 2016.

The BRE surveys are initiated by local community partners involved in the area of economic development, typically the local Chamber of Commerce plays a pivotal role. In most instances the BRE surveys are undertaken as part of the regular services that the local agencies provide to local businesses. The agencies then work collaboratively to help implement the recommendations identified in the BRE survey.

This report was initiated and prepared by the Rural Development Institute with Kootenay Rockies Tourism providing external review.

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

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.

A sector based report, such as this report on the tourism sector, allows for a regional overview of a specific sector. It can be used to draw attention to issues that are regional in nature and foster collaboration among stakeholders on areas of mutual interest.

PROJECT OBJECTIVES

BRE studies typically focus on four objectives:

1. Identify the needs, concerns, and opportunities of existing businesses in order that, where appropriate, action can be taken to respond to the businesses' needs or development opportunities;
2. Learn of the future plans of the region's businesses with respect to expansion, relocation and /or retention and follow-up where assistance can be provided;

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

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

As this BRE was commissioned by the Columbia Basin RDI the results will be circulated among local governments, economic development organizations, and tourism related organizations (e.g., DMOs) within the region. Those communities with an existing BRE will be able to compare their tourism sector with the regional tourism sector as a whole, potentially identifying new ideas and actions.

RESEARCH CONSIDERATIONS

THE BRE SURVEY

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

The base survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey. The thirteen Labour Market specific questions were added to the base survey in order to identify and address labour market supply and demand, uncover emerging labour market trends, as well as determine barriers to labour retention. 109 of the 152 tourism sector businesses included in this report completed the additional thirteen region-specific questions.

THE DATA SET

The companies that participated in the interviews were identified and selected as part of each of their communities' individual Business Retention and Expansion projects. Selection criteria differs with each community, but typically includes a review of business license information and North American Industry Classification System (NAICS) codes to ensure a representative cross section of the business community.

Subsequent to those community based surveys, the companies included in this report were identified as forming part of the tourism sector through an analysis of the North American Industry Classification System (NAICS) codes. Those codes cover businesses from the transportation, accommodation, food and beverage services, recreation and entertainment, and travel services. A list of the NAICS codes used in this report are attached as Appendix B. A total of 152 businesses from the tourism sector within 14 communities from across the region were identified for inclusion in this report.

DATA COLLECTION

Researchers within each community are retained by community BRE partners to interview local companies and to enter the data gathered from the interviews into the ExecutivePulse database. On average, the interview process takes approximately 90 minutes to two hours to complete, and the data entry requires an additional hour per interview. The persons interviewed are typically either the owners of the businesses or a senior manager in the company.

DATA INPUT, ANALYSIS AND REPORTING

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

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

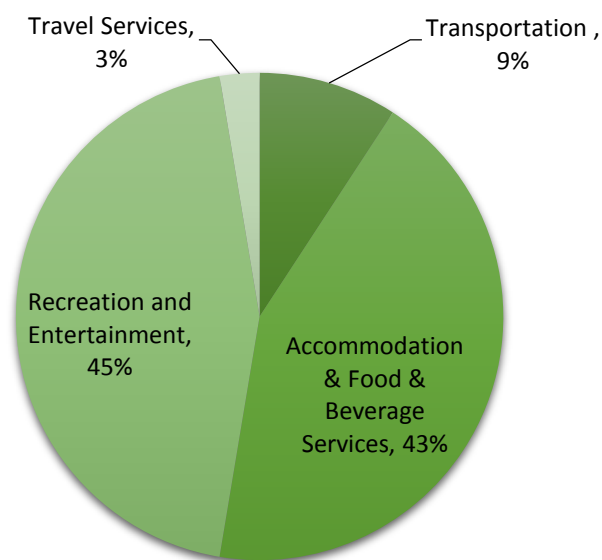
RESEARCH FINDINGS²

COMPANY INFORMATION

Regions Represented

Businesses selected for this report were selected for their involvement in the tourism sector, and cover businesses from the transportation (9%), accommodation, food and beverage services (43%), recreation and entertainment (45%), and travel services (3%). For a detailed list of the industry codes represented in this report, refer to Appendix B.

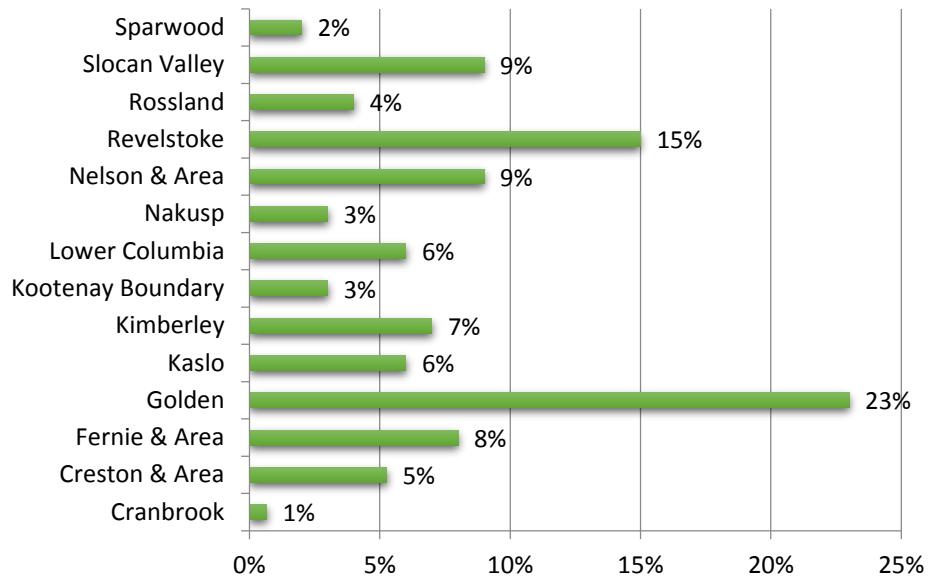
Figure 1: Industries Represented



23% of businesses included in this report are from Golden and area, 15% from Revelstoke, 9% from the Slocan Valley, and 9% from Nelson and area.

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

Figure 2: Regions Represented

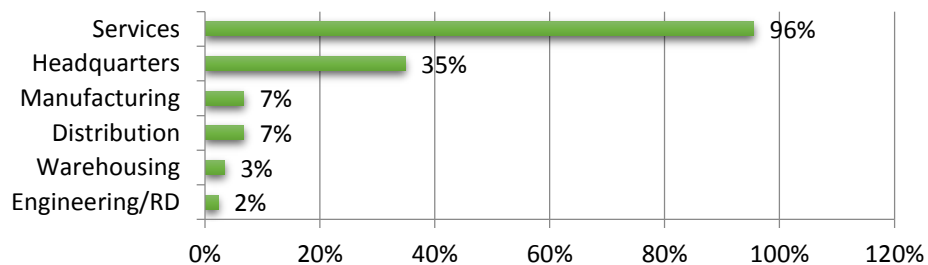


Note: 152 respondents

Facility Function

The vast majority of respondents (96% or 85 respondents) indicated that their facility provides services. Other primary functions include 'headquarters' (35% or 31 respondents), 'manufacturing' (7% or 6 respondents), and 'distribution' (7% or 6 respondents). Fewer respondents indicated that their facility serves an engineering/research and development function or warehousing function.

Figure 3: Facility function(s)



Note: 89 respondents

Competition

The vast majority of competition (78 % or 46 responses) reported was coming from within the regional area³.

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

Location	Percentage
In Region	78%
Outside Canada	12%
In Province	10%
In Canada	3%
None	5%

Factors for Success

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Excerpts illustrating the factors that make the company successful:

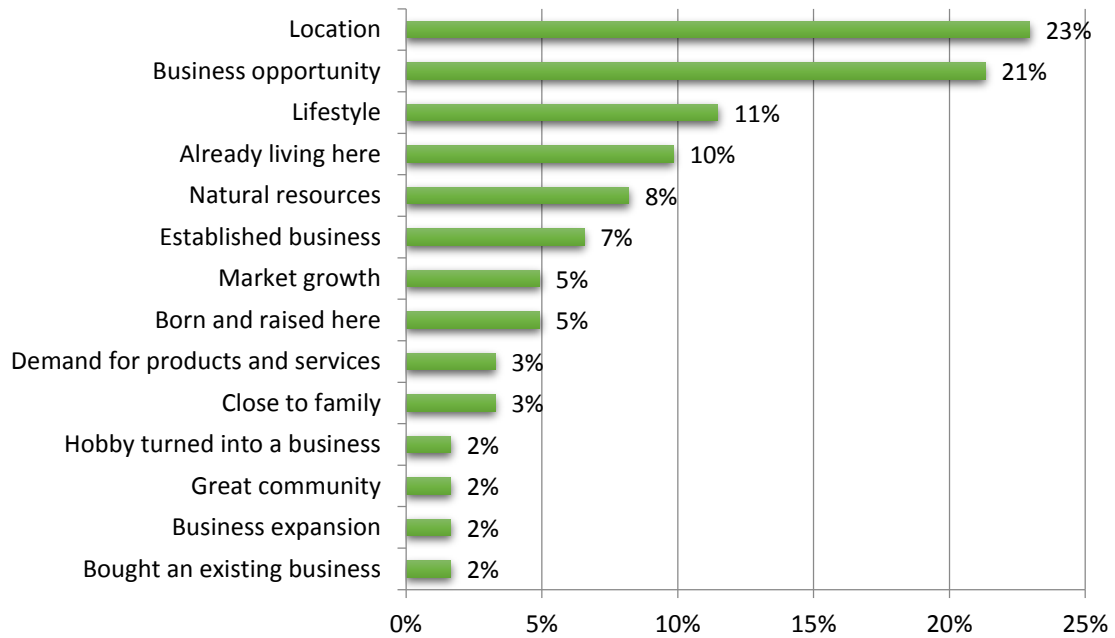
"Geographic - proximity to Calgary and its international airport."

"...location - halfway along southern BC route so is a 'handy place."

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

Respondents most frequently cited the location (23% or 14 respondents) followed by a business opportunity (21% or 13 respondents) for choosing their location. Other factors include the lifestyle (11% or 7 respondents) and existing ties to the area (10% already living here, 5% born and raised here, 3% close to family).

Figure 6: Choosing the Location



Note: 61 respondents

Other Locations

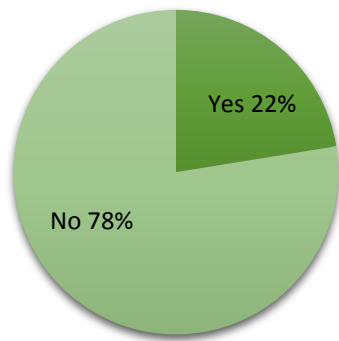


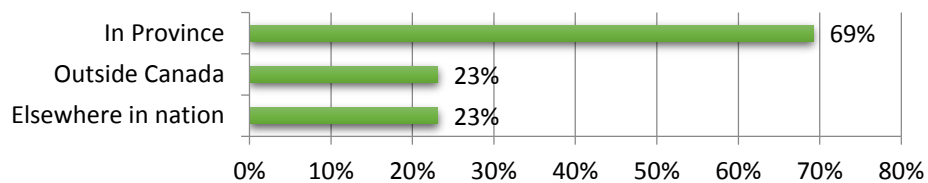
Figure 7: Other Locations

22% of respondents (22 respondents) indicated that their company has other locations.

Note: 98 respondents

69% of those other locations (9 respondents) are in other areas of the province, 23% (3 respondents) are in other parts of Canada, and 23% (3 respondents) are outside of the country.

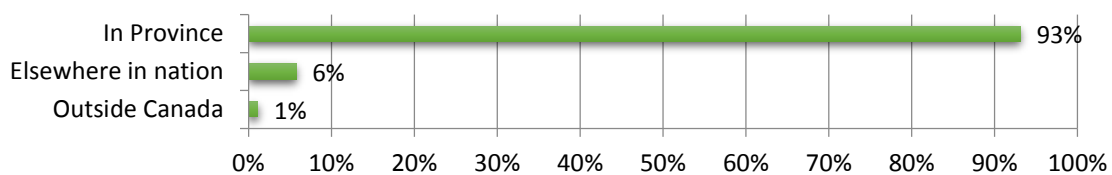
Figure 8: Location of Other Locations



Note: 13 respondents

93% (81 businesses) of respondents reported that their headquarters are located within British Columbia, 6% (5 businesses) indicated that they are headquartered in other parts of Canada, while 1% (1 business) has their headquarters outside of Canada.

Figure 9: Location of headquarters

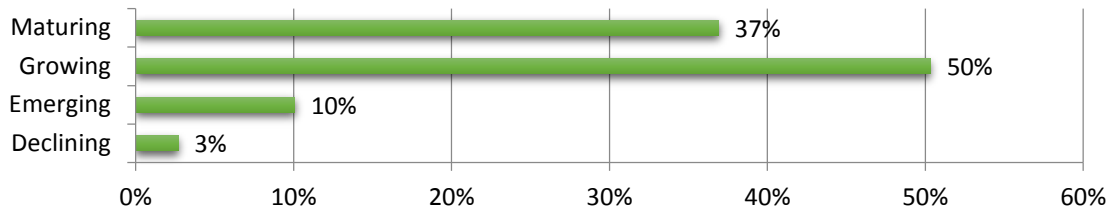


Note: 87 respondents

Age and Life Cycle Stage

Half of all respondents (50% or 75 respondents) reported that their business is in the 'growing' life cycle stage. Another 37% (55 businesses) indicated that their business is in the 'maturing' stage. Only 10% (15 businesses) indicated that they are in the 'emerging' stages, and just 3% (4 businesses) indicated they were declining.

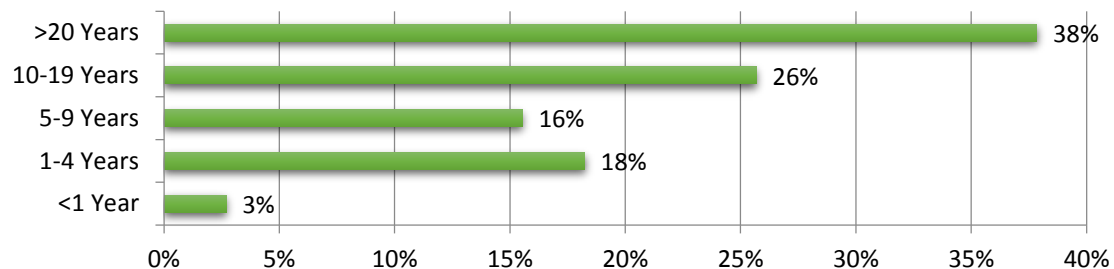
Figure 10: Life cycle stage



Note: 149 respondents

Most businesses (56 respondents or 38%) reported that they have been in business for over 20 years. A significant number reported that they have been in business for 10 - 19 years (38 respondents or 26%), while 18% (27 respondents) indicated they have been in business for between 1 and 4 years, and 16% (23 businesses) have been in business for between 5 and 9 years, and just 3% (4 businesses) have been in business less than 1 year.

Figure 11: Length of time in business

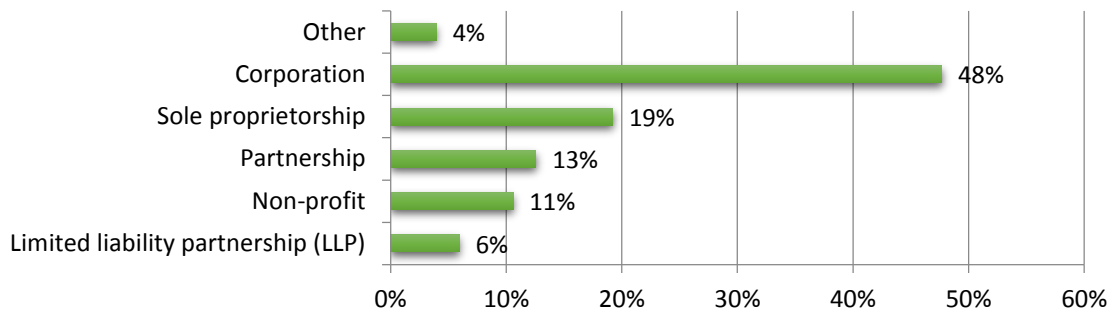


Note: 148 respondents

Ownership and Management

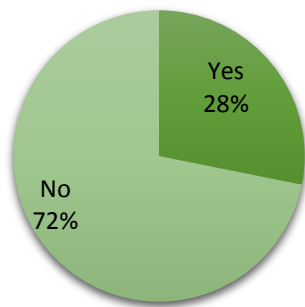
93% of all companies are privately owned, with just 7% publicly owned. Most respondents (72 respondents or 48%) indicated that their business is classified as a corporation, while 19% (29 respondents) indicated that they are a sole proprietorship. The remainder of businesses identified as limited liability partnership (6% or 9 respondent), partnership (13% or 19 respondents), non-profit (11% or 16 respondents), or other (4% or 6 respondents).

Figure 12: Type of business



Note: 151 respondents

Figure 13: Ownership and management changes in last 5 years



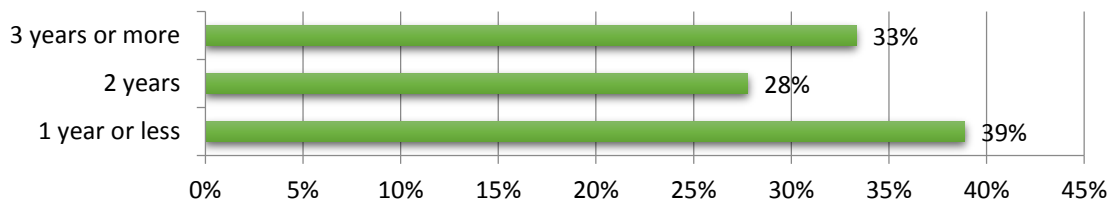
72% of businesses (97 businesses) have *not* seen a management or ownership change in the last 5 years, while 28% of businesses (38 businesses) have changed management and/or ownership over that same period of time. Just 15% of businesses (22 respondents) are expecting an ownership change in the near future. Of the 38 respondents that have seen changes in management and or ownership, 70% (26 businesses) report that the change had a positive impact.

Note: 135 respondents

Succession and Business Plans

Of the 22 businesses (15%) that responded and reported a pending ownership change, 7 (39%) expect the change will happen in a year or less, 6 (33%) expect the process to take 3 or more years, and 28% or 5 businesses anticipate it taking 2 years.

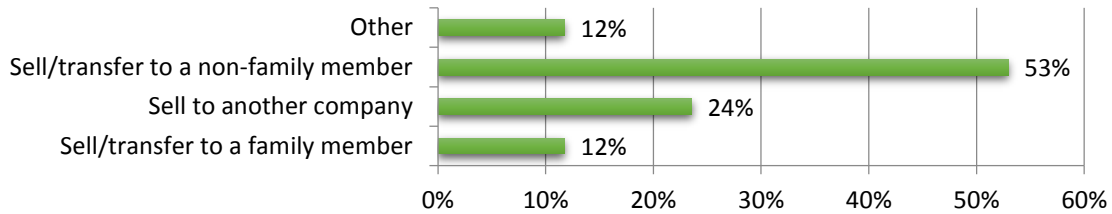
Figure 14: Anticipated timeline for ownership change



Note: 18 respondents

53% of respondents (9 respondents) expect that the current owner will exit the business by selling it to a non-family member, while 24% (4 respondents) expect it to be sold/transferred to another company. 12% (2 businesses) expect it to be sold to a family member.

Figure 15: Anticipated exit strategy



Note: 17 respondents

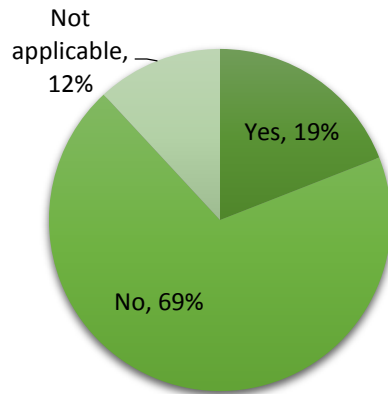


Figure 16: Existence of formal succession plan

Only 19% (24 respondents) of businesses reported that they have a formal succession plan in place, and just 15% have identified a successor for their business. Of those that completed a succession plan, 67% received assistance in its preparation.

Note: 126 respondents

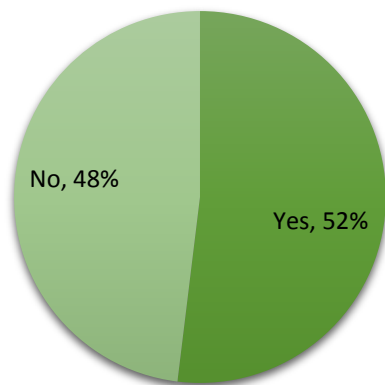


Figure 17: Existence of current business plan

Just over half of all respondents (52% or 67 respondents) indicated that they have a business plan in place.

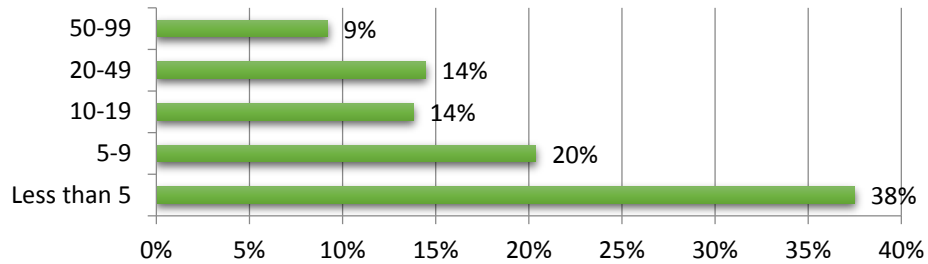
Note: 129 respondents

LOCAL WORKFORCE

Size of Workforce

The 152 businesses interviewed reported a total of 4,071 employees. 38% or 57 of the businesses surveyed indicated that they have less than five employees, and another 20% or 31 businesses indicated that they have between 5 and 9 employees.

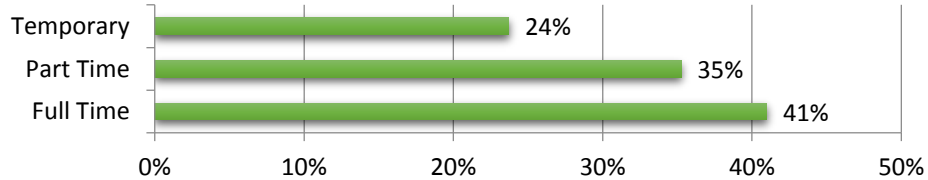
Figure 18: Total number of employees



Note: 152 respondents

41% (1,669) of employment positions at surveyed businesses are full-time, while 35% (1,436) are part-time, and 24% (966) are temporary.

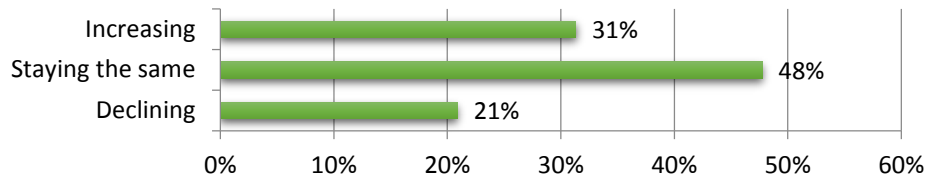
Figure 19: Nature of employment



Note: 152 respondents

48% of respondents (64 businesses) indicated that the number of employees at their business has stayed the same historically, while 31% (42 businesses) indicated that the size of their workforce has increased. 21% (28 businesses) indicated a decrease.

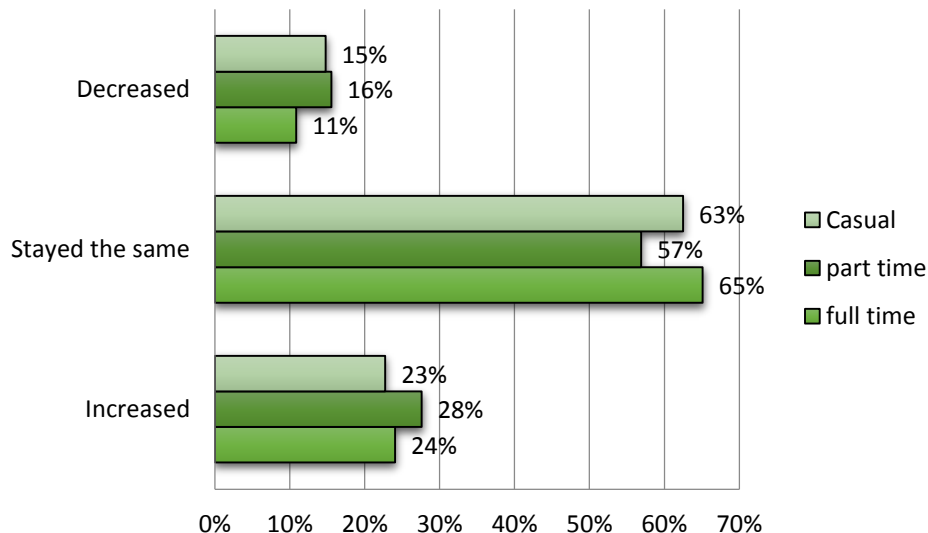
Figure 20: Historical Employment trend⁴



Note: 134 respondents

The last three years has generally seen stability in the size of the workforce, with between 57% and 65% of businesses reporting that the number of employees has stayed the same, and between 23% and 28% reporting that employment over that three year time period has increased. Interestingly the employment trend for full-time, part-time, and casual employment was generally consistent over the previous three years.

Figure 21: Employment trend over last 3 years

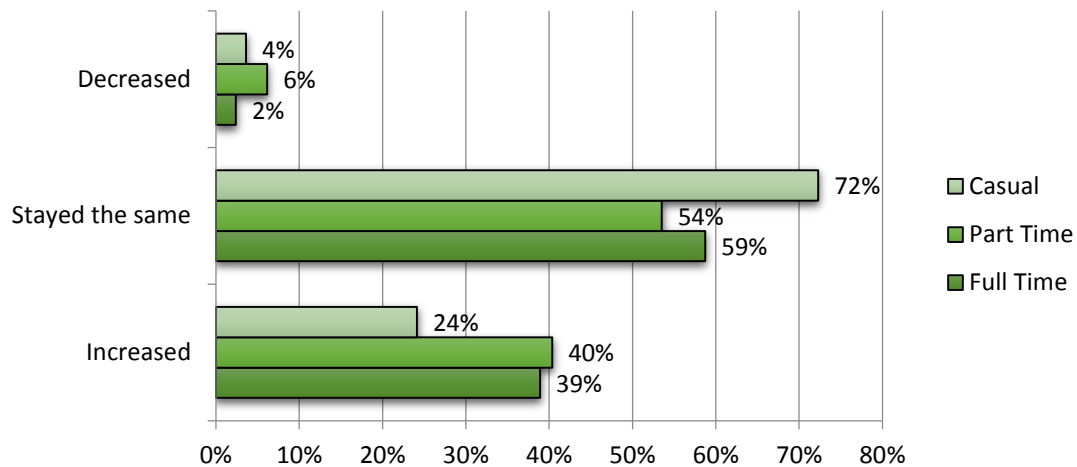


Note: #of respondents varies

The majority of businesses interviewed expect the size of their workforce to stay the same over the next 3 years, with between 54% and 72% of businesses reporting that the number of employees is expected to stay the same, and between 24% and 40% reporting that employment over the next three year time period is expected to increase. Again, the expected employment trends for full-time, part-time and casual employment are generally consistent, with some expected increase in the number of full-time and part-time employees.

⁴ The question considered a 10 year historical trend.

Figure 22: Employment trend over next 3 years

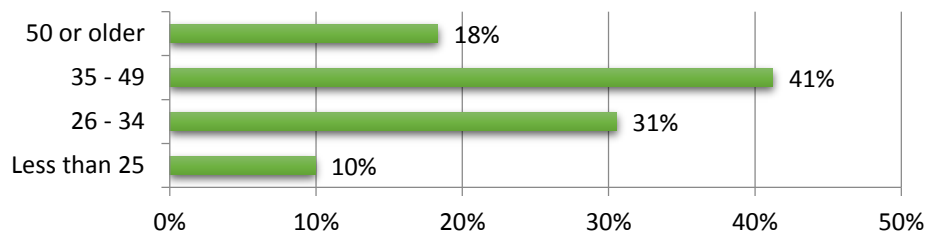


Note: #of respondents varies

Workforce Demographics

41% (54 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 31% (40 respondents) of businesses indicated that their workforce is between 26 and 34, 18% (24 businesses) are 50 and older, and 10% (13 businesses) have a workforce under the age of 25.

Figure 23: Age of the majority of essential employees



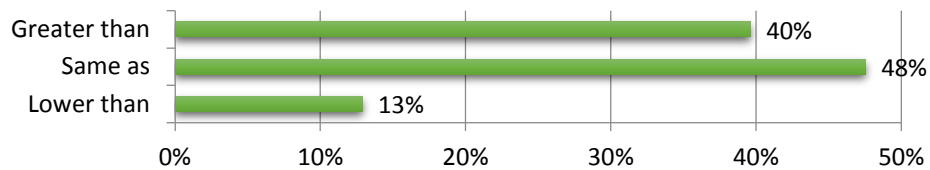
Note: 131 respondents

Wages

When reporting on average wages for skilled or professional workers, the majority of responses indicated they pay between \$20 and \$29 per hour (41% or 33 businesses) and between \$15 and \$19 per hour (19% or 15 businesses). The most commonly reported average hourly wage for semi-skilled workers (38% or 27 businesses) was between \$15 - \$19 and the most commonly reported average wage for entry-level workers (60% or 38 businesses of respondents) was between \$10 and

\$12. 48% of respondents (48 respondents) reported that their wage scale is similar to other businesses in the region⁵.

Figure 24: Wages in relation to other businesses in the region

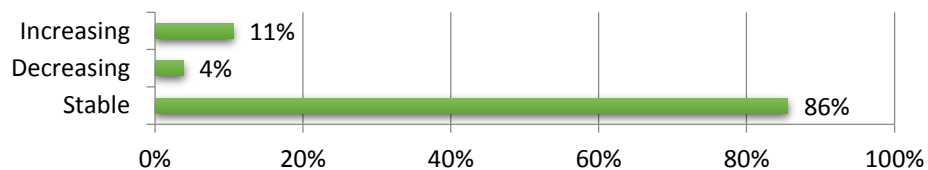


Note: 101 respondents

Recruitment and Retention

Of those businesses that responded, 86% (89 respondents) indicated that the number of unfilled positions at their company would remain constant.

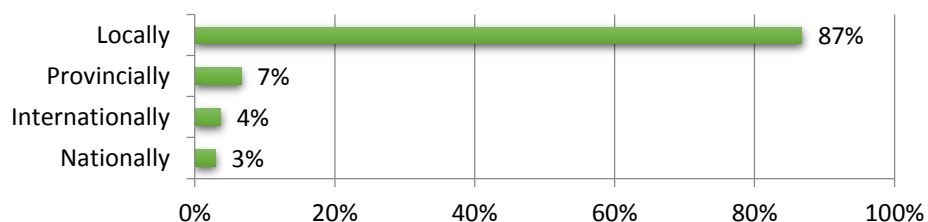
Figure 25: Trend in unfilled positions



Note: 104 respondents

The vast majority of respondents (87% or 118 respondents) reported that they primarily recruit employees from local labour markets. 7% (9 respondents) recruit provincially, while 4% (5 respondents) report that they recruit at the international level, and 3% (4 respondents) recruit at a national level.

Figure 26: Location of workforce recruitment

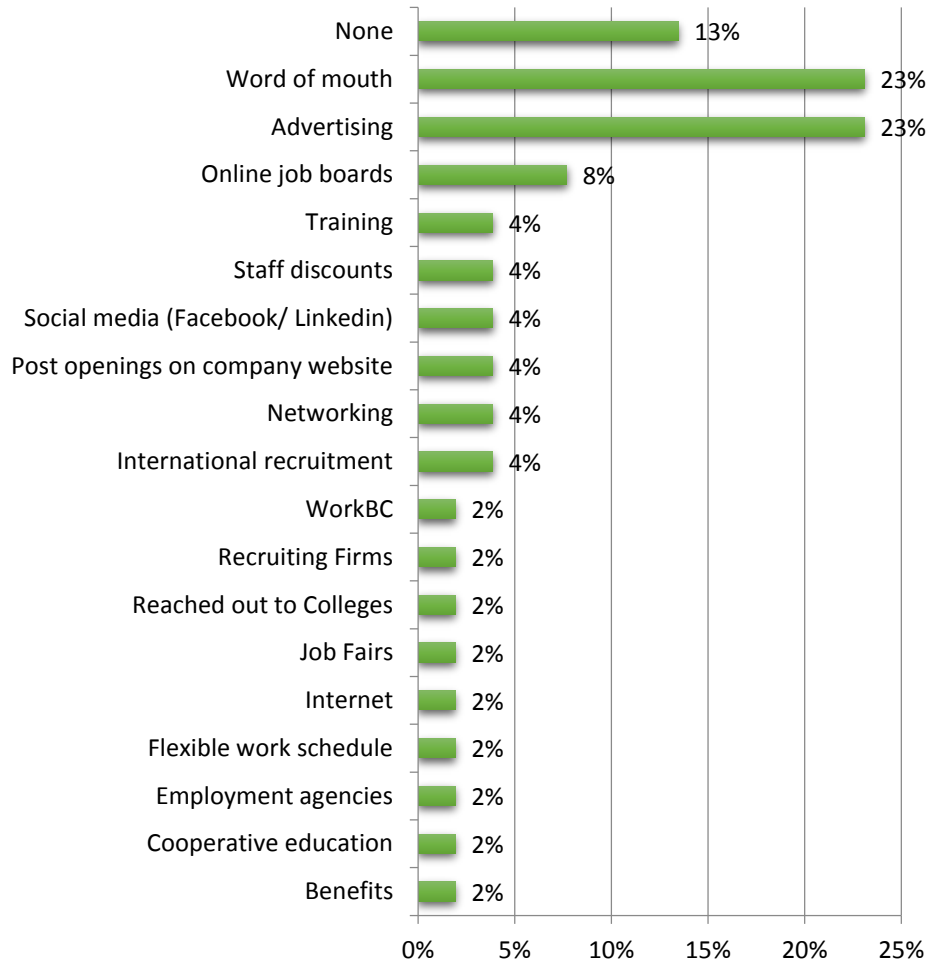


Note: 136 respondents

⁵ Detailed wage data is found in Appendix A.

When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often were word of mouth (23% or 12 respondents) and advertising (23% or 12 respondents). Respondents also cited using a wide variety of other means, including using online job boards, training, staff discounts, social media, and the internet.

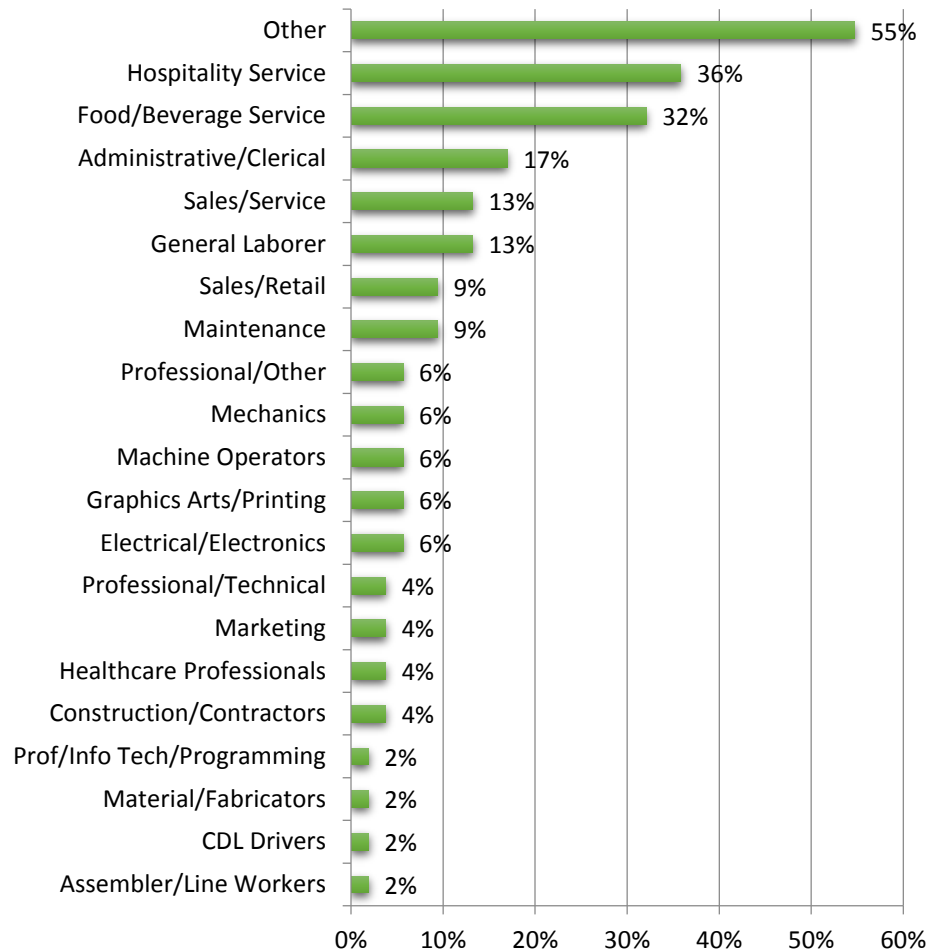
Figure 29: Recruitment Activities



Note: 52 respondents

Of the 54 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include the hospitality service industry (36% or 19 respondents) and food/beverage service (32% or 17 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

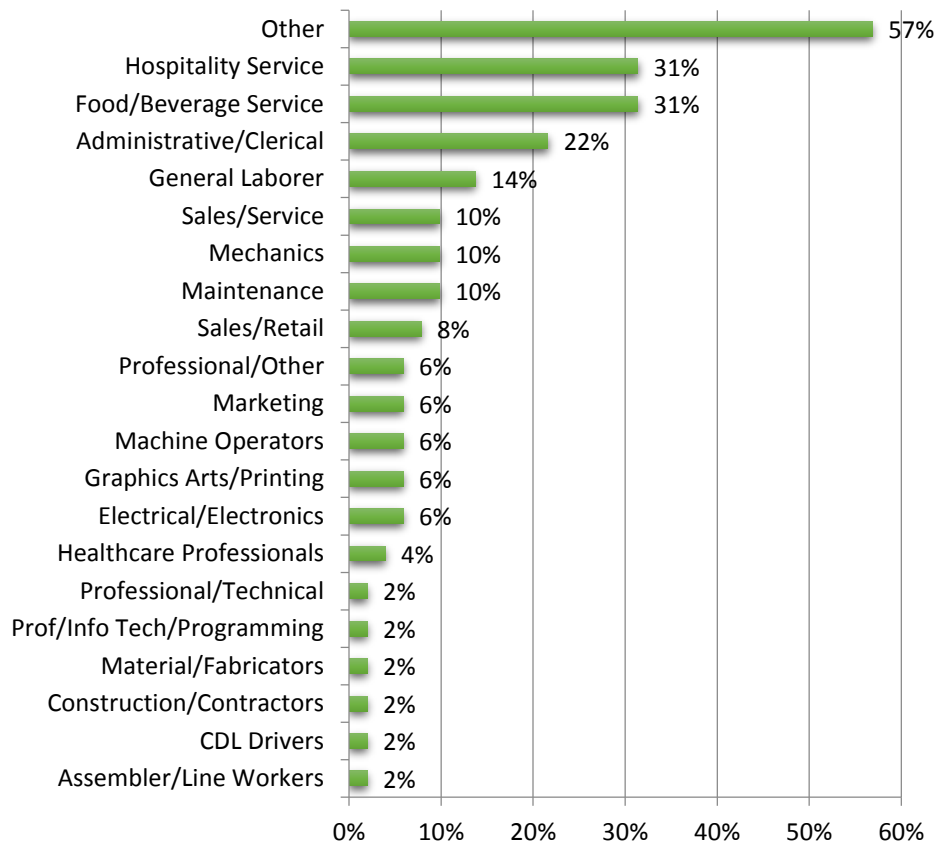
Figure 30: Current recruitment areas



Note: 53 respondents

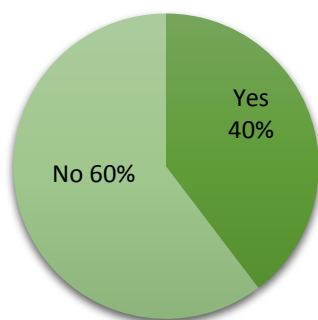
41% of respondents (54 businesses) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include hospitality service (31% or 16 respondents) and food/beverage service (31% or 16 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 31: Future areas where recruitment may be challenging



Note: 51 respondents

Figure 32: Strategies to overcome employee recruitment challenges



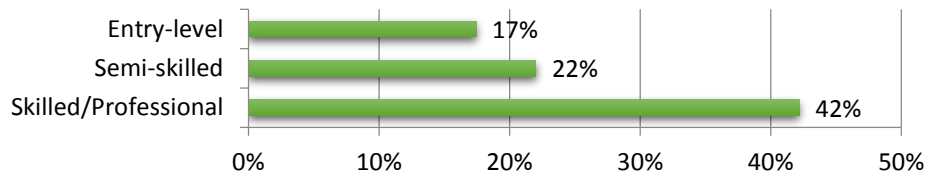
40% of respondents (23 respondents) indicated that they believed there were strategies that could be undertaken to address employee recruitment. 18% (4 respondents) believed that better job advertising could be effective, while 14% (3 respondents) suggested help with the foreign worker program and another 14% (3 respondents) suggested supporting affordable housing.

Note: 58 respondents

Skills and Training

The majority of respondents (42%) indicated that over half of their workforce is comprised of skilled or professional workers, 22% indicated that their workforce is mainly semi-skilled workers and 17% indicated that entry-level workers make up the majority of their workforce.

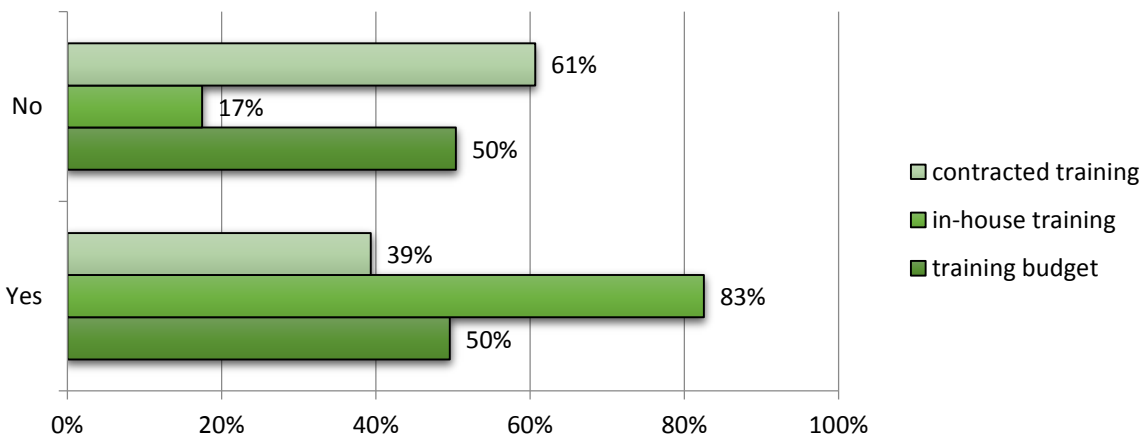
Figure 33: Skill level of majority of workforce



Note: # of respondents varies

50% (62 businesses) indicated that there is a training budget to upgrade employee skills. 83% (52 businesses) indicated that their company offers in-house training, 39% (24 businesses) use contracted training.

Figure 34: Training Budget



Note: # of respondents varies

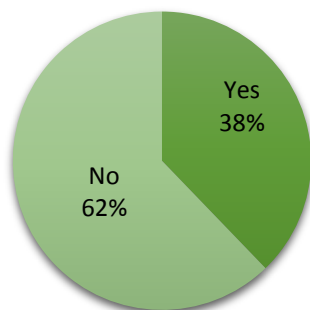


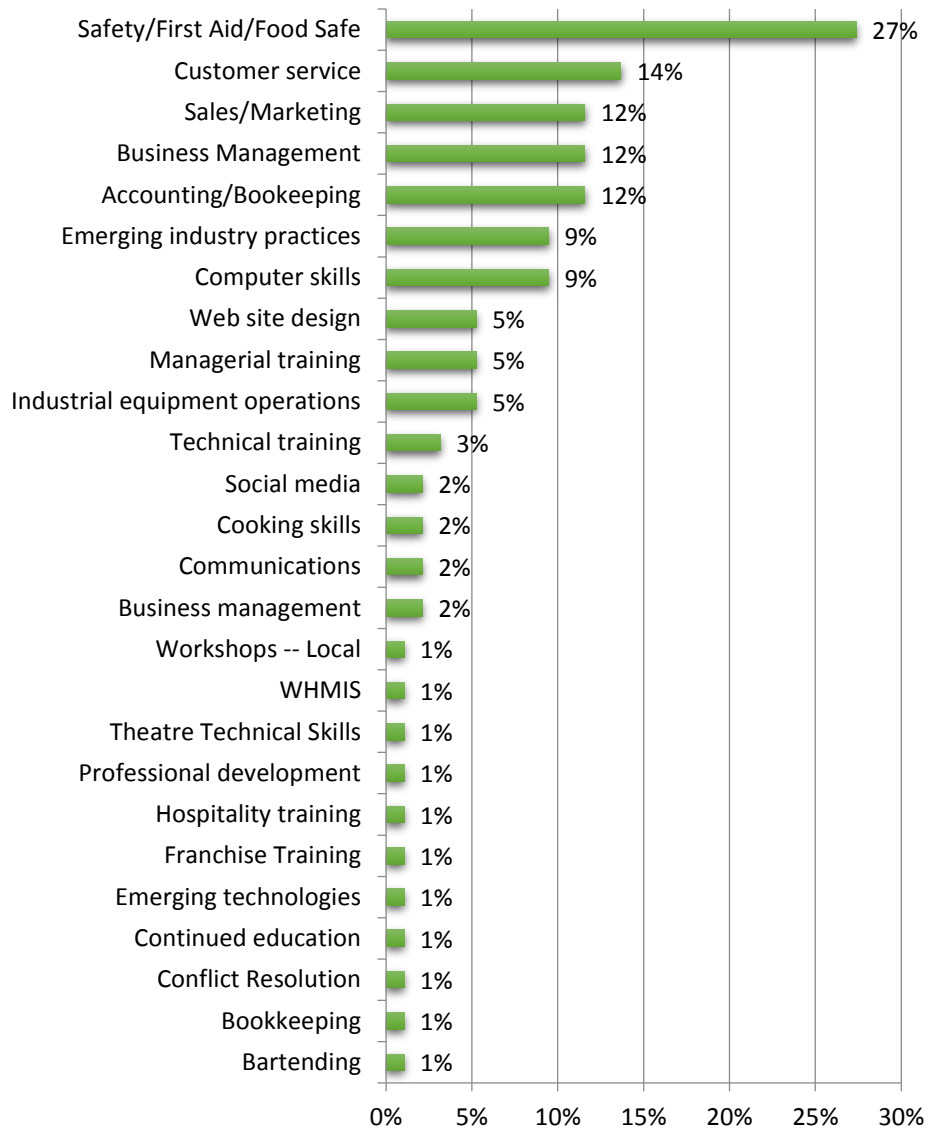
Figure 35: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills

38% of respondents (48 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

Note: 127 respondents

74% or 97 respondents indicated that there are areas of training or professional development that would be of benefit. Most commonly listed among these areas were safety, first aid, food safe (27% or 26 businesses), and customer service (14% or 13 businesses).

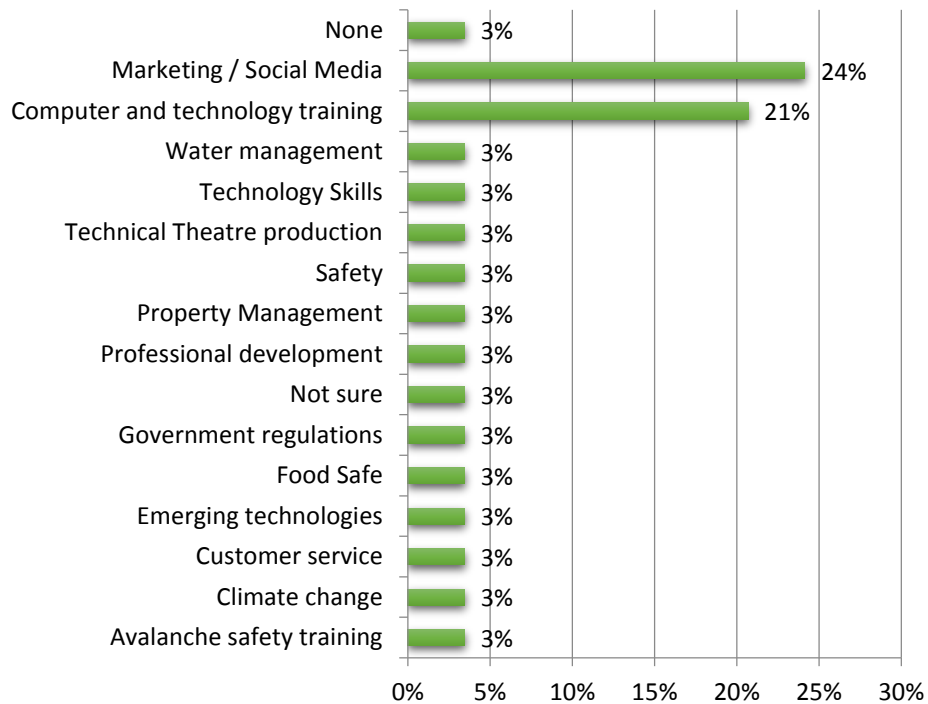
Figure 36: Training or professional development needs



Note: 95 respondents

When asked what new training might need to be considered in the next five years, the most commonly cited response was marketing and social media (24% or 7 businesses) and computer and technology training (21% or 6 businesses).

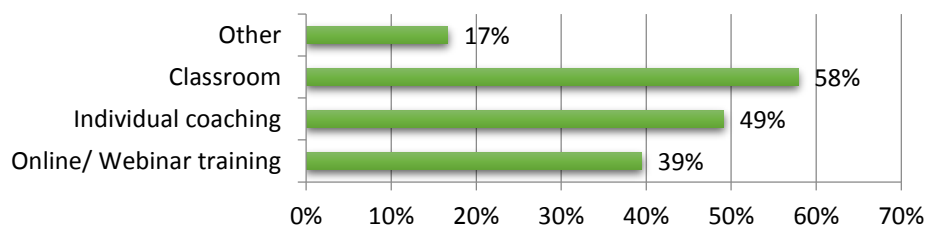
Figure 37: Areas for new Training in next five years



Note: 29 respondents

58% of respondents (66 businesses) stated that they prefer training when it is delivered through a classroom setting, while 49% (56 businesses) preferred individual coaching, and 39% had a preference for online / webinar training (45 businesses).

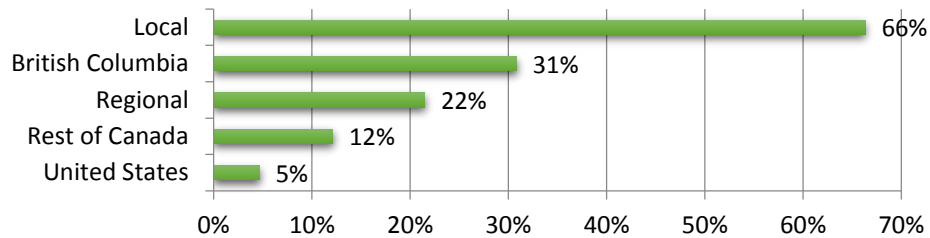
Figure 38: Preferred modes of training



Note: 114 respondents

66% of respondents (71 businesses) typically seek training opportunities that are offered locally, and 31% (33 businesses) travel to other areas in the province for their training or within the region (22% or 23 businesses). Fewer training opportunities are sought elsewhere in the country or in the United States.

Figure 39: Usual training locations



Note: 107 respondents

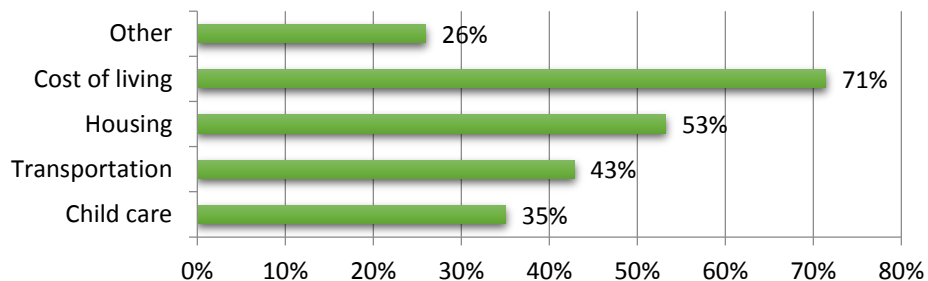
Unions

7 businesses (5%) surveyed reported that they have union status.

Employees

The most frequently cited critical issues for employees are the cost of living (71% or 55 businesses) and housing (53% or 41 businesses). Child care (35% or 27 businesses) and transportation (43% or 33 businesses) issues were also cited. For a list of factors included in the “other” category charted below, refer to Appendix A.

Figure 40: Critical considerations for employees



Note: 77 respondents

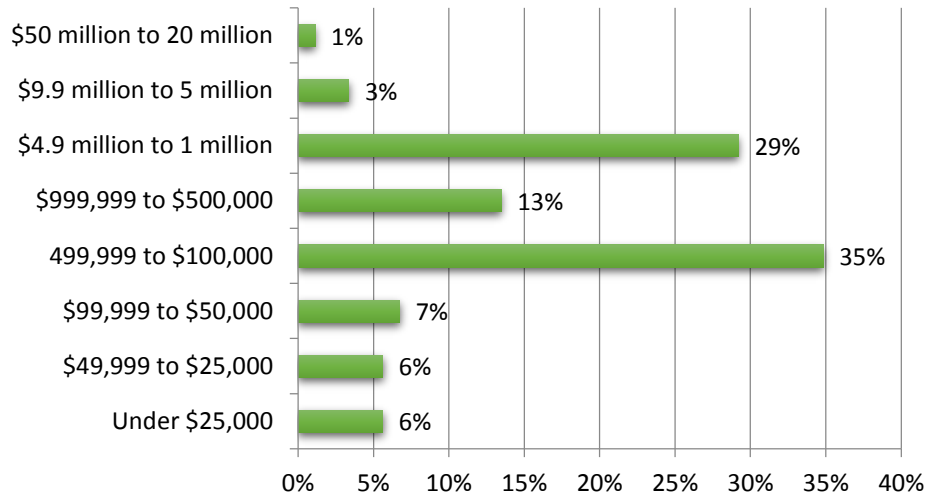
95% of businesses (79 businesses) interviewed reported that over 75% of their employees live within the community, 15% (3 businesses) indicated that 75% of the employees live elsewhere in the region, and 9% (1 business) indicated that over 75% of their workforce lives outside of the region.

SALES

Market Size and Share

The highest number of respondents (31 businesses or 35%) reported annual sales between \$100,000 and \$499,999. The second highest number of respondents (26 businesses or 29%) reported annual sales of between \$1 million and \$4.9 million.

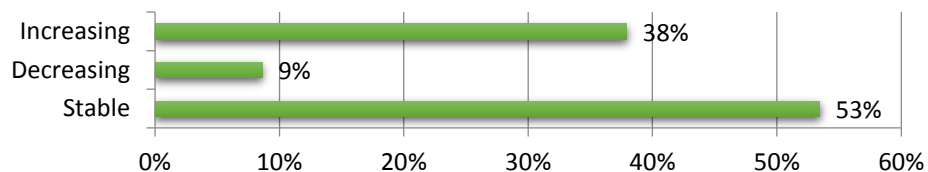
Figure 41: Annual sales



Note: 89 respondents⁶

The majority of businesses interviewed (53% or 62 businesses) indicated that the size of the market for their product or service is stable. Another 38% (44 businesses), reported that the market is increasing.

Figure 42: Status of market for product/service

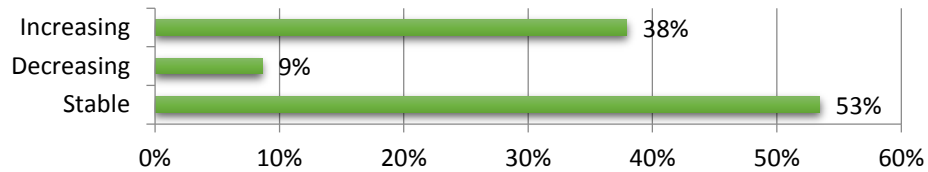


Note: 116 respondents

⁶ Note: question was optional for respondents.

53% (62 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is stable, while 38% (44 businesses) indicated that it is increasing. A small number of respondents (9% or 10 businesses) indicated that their market share is decreasing.

Figure 43: Market Share in Comparison to Competitors

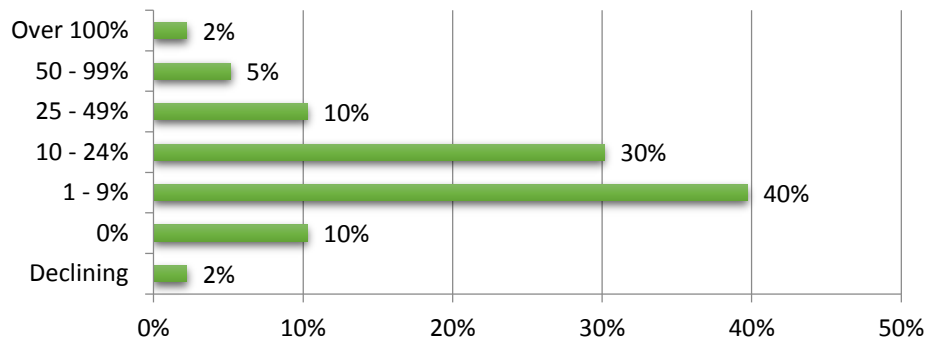


Note: 116 respondents

Growth

40% of respondents (54 businesses) expect to see low growth in sales in the realm of 1 - 9%. Moderate growth in sales of 10-24% over the next year is projected by 30% of respondents (41 businesses). A combined 17% (total of 24 businesses) expect strong sales growth of over 25%. 10% (14 businesses) of respondents expect their sales to remain stagnant, while a further 2% (3 businesses) expect sales to decline.

Figure 44: Projected sales growth in the next year



Note: 136 respondents

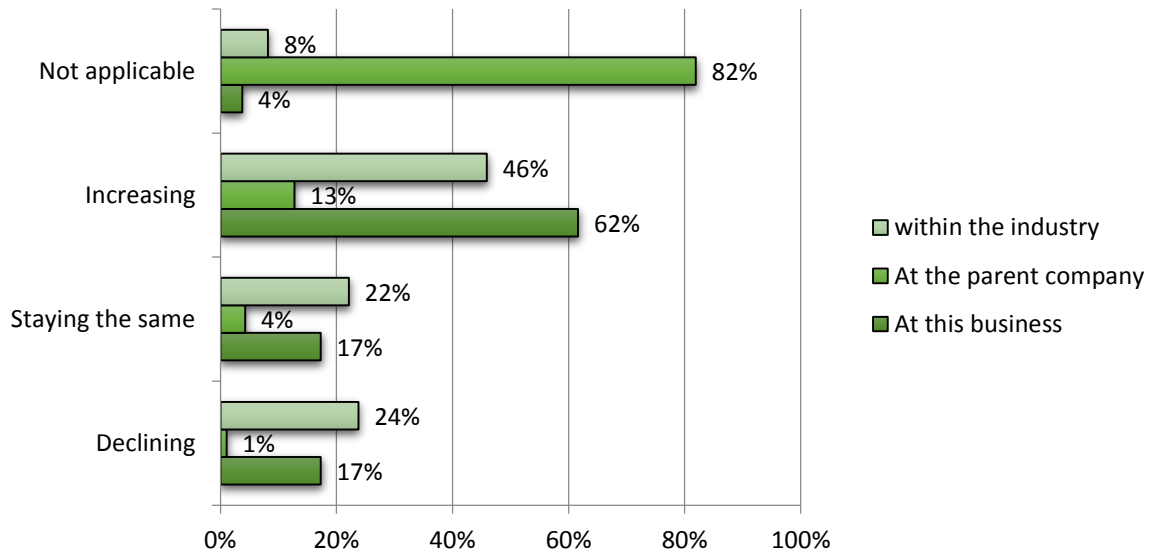
The majority of responses (62% or 82 businesses) indicated that sales at their business have increased over time, 17% (23 businesses) indicated that sales have remained relatively stable, and 17% (23 businesses) reported that sales have declined.

13% or 12 businesses reported that sales at their parent company have historically increased, 4% (4 businesses) reported that they have stayed the same, and 1% (1 business) reported a decline. It is worth noting the high non response/not applicable response to this question.

Data indicates that the sales trend within respondents' respective industries has more closely followed the sales trend reported at the location rather than the parent company. 46% percent of

respondents (56 businesses) reported that sales within their industry have been increasing, while 22% (27 businesses) reported that they have stayed the same, and an additional 24% (29 businesses) indicated sales in their industry are declining.

Figure 45: Historic sales trend

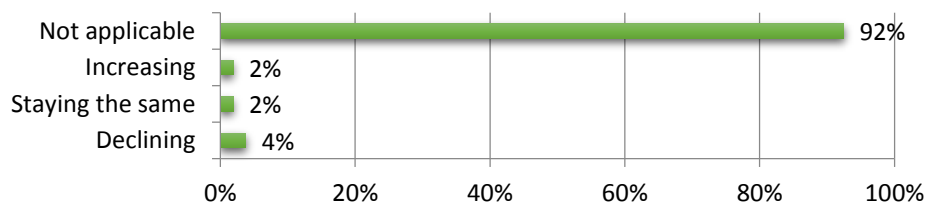


Note: # of respondents varies

Export Sales

Of the 8 businesses that reported exporting to international markets, 4% (4 businesses) indicated that their export sales have declined, 2% (2 businesses) indicated that they have been stable, and 2% (2 businesses) reported any decline in sales.

Figure 46: Export sales trend

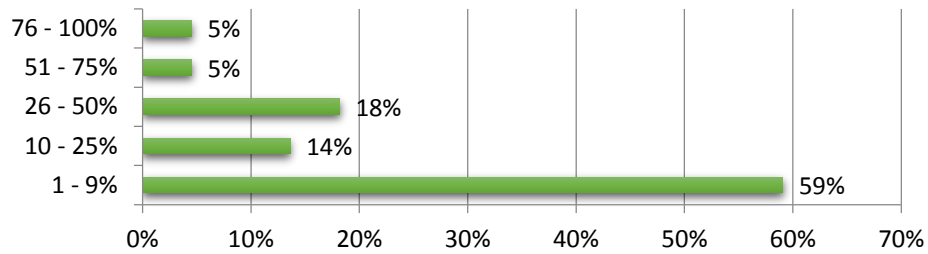


Note: 106 respondents

Source of Sales

The customer base among tourism related businesses appears to be reliant on a diverse customer base, with the largest percentage of respondents (59% or 13 businesses) indicating that 1 – 9% of their sales are generated by their top three customers.

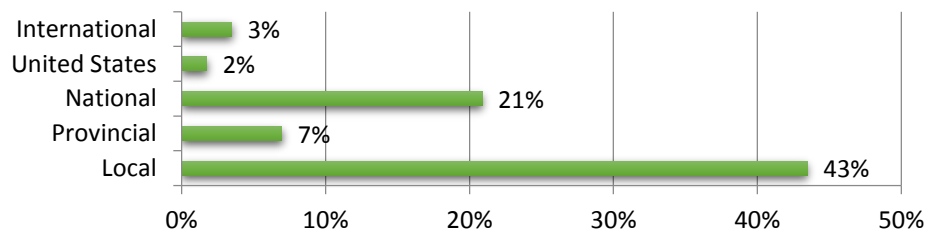
Figure 47: Sales generated by top three customers



Note: 22 respondents

Respondents most commonly (43%) indicated that over 50% of their sales are to customers within the local community or region. 21% indicated that over 50% of their sales are within the country and 7% indicated the majority of sales are within the provincial market. Significantly fewer respondents reported that the majority of their sales to the U.S. (2% or 2 respondents) or to international markets (3% or 4 respondents). Additionally, when asked whether they supply products or services to any company in the community, 48% (27 respondents) indicated that they did.

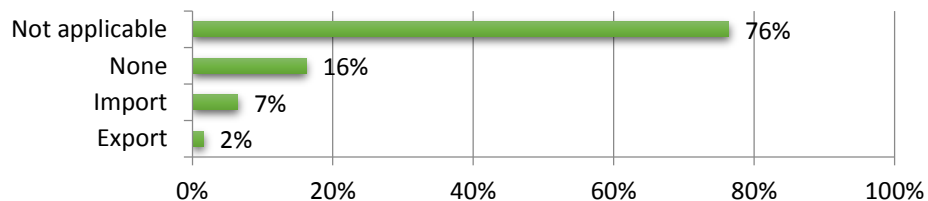
Figure 48: Geographic source of majority of sales



Note: # of respondents varies

Just 8 respondents (7%) indicated that they import goods or services from other countries and 2 respondents (2%) indicated that they export goods or services to other countries. 93% of respondents did not find the question applied to them, or responded that they had no international trade status.

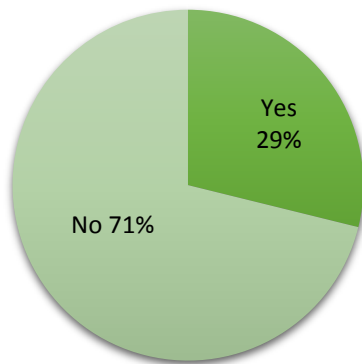
Figure 49: International trade status



Note: 123 respondents

Procurement

Figure 50: Engagement with government procurement processes

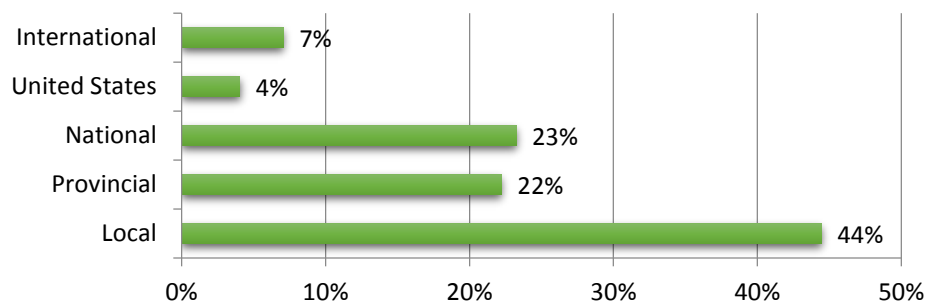


Only 29% (15 respondents) indicated that they engage in government procurement.

Note: 52 respondents

44% of respondents (44 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 23% (23 businesses) indicated that the majority of their supplies come from national businesses, while 22% (22 businesses) indicated that provincial businesses supplied their business.

Figure 51: Geographic source of majority of supplies

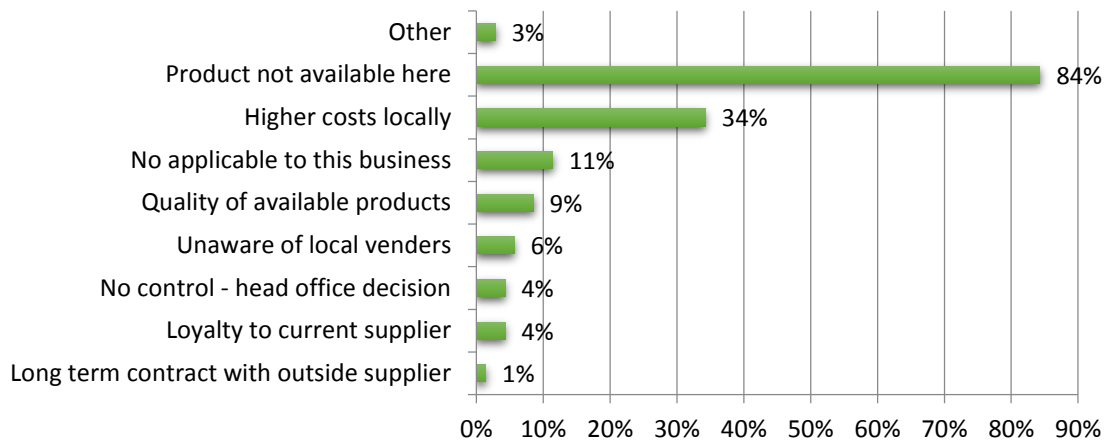


Note: # of respondents varies

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (84% or 59 businesses) indicated that the products they need are not available locally.

Figure 52: Reason for out-of-area purchasing



Note: 70 respondents

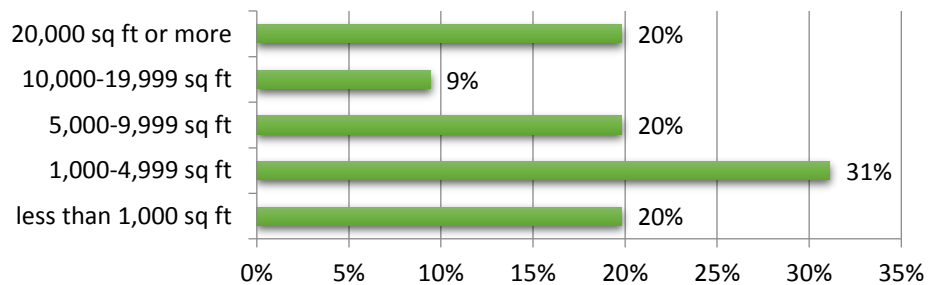
The most commonly referenced products that businesses stated they would like to source from a local supplier include meats, dairy, fruits, vegetables and grains.

FACILITIES AND EQUIPMENT

Size and Condition

31% (33 businesses) of respondents reported that their facility is between 1,000 square feet and 4,999 square feet in size.

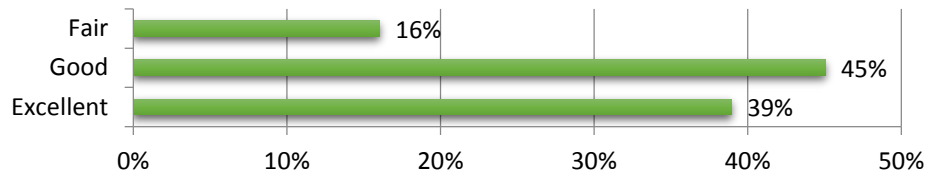
Figure 53: Size of facility



Note: 106 respondents

45% of respondents (59 businesses) indicated that their facility is in good condition. Another 39% (51 businesses) indicated that it is in excellent condition and 16% (21 businesses) reported that their facility is in fair condition. No businesses reported that their facility is in poor condition.

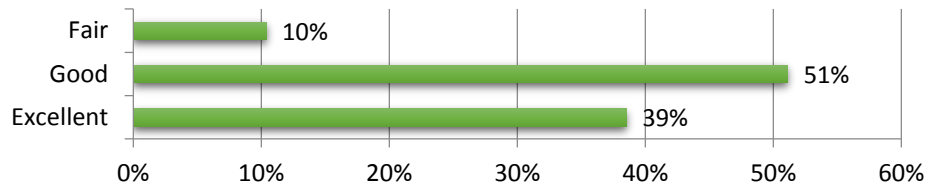
Figure 54: Condition of facility



Note: 131 respondents

51% (69 businesses) of respondents indicated that their equipment is in good condition. 39% (52 businesses) indicated that it is in excellent condition and 10% (14 businesses) report their equipment is in fair condition, and none were in poor condition.

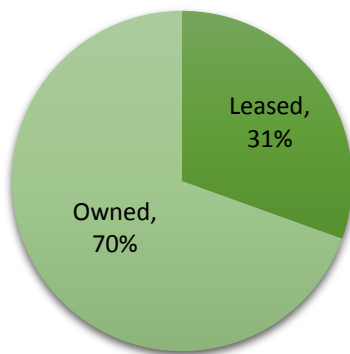
Figure 55: Condition of equipment



Note: 135 respondents

Ownership

Figure 56: Ownership status of facility

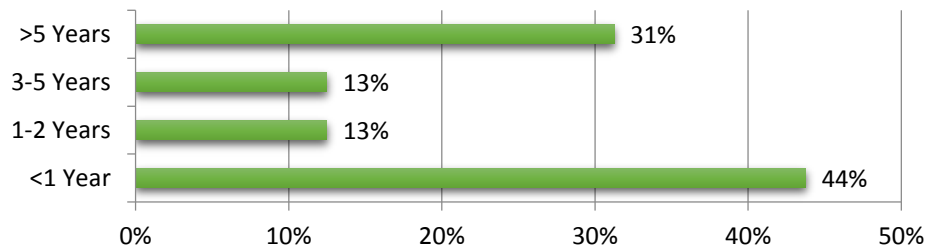


70% of respondents (98 businesses) own the facility in which they operate and 31% (43 businesses) lease it.

Note: 141 respondents

Of the 43 businesses that lease their facility, and provided a response to the question, 44% have less than 1 year remaining on their lease and another 31% have more than five years remaining. The majority of respondents that lease their facility (71% or 29 businesses) intend to renew their current lease agreement.

Figure 57: Length of time remaining on lease



Note: 32 respondents

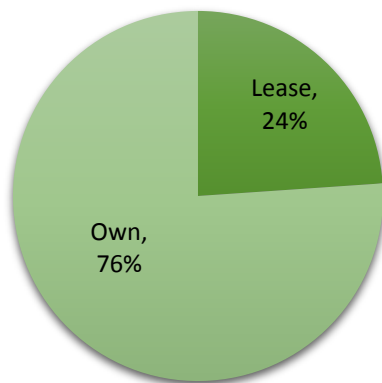


Figure 58: Ownership preference

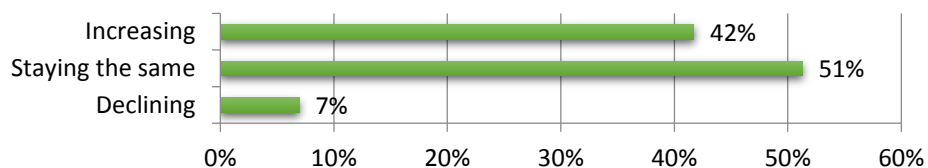
76% of respondents (35 businesses) would prefer to own their facility.

Note: 46 respondents

Investment and Expansion

51% of respondents (59 businesses) indicated that their company's investment in their facility has stayed the same over the past 18 months, while 42% (48 businesses) indicated that the investment has increased. Only eight businesses (7%) indicated that investment in their facility has decreased over the same time period.

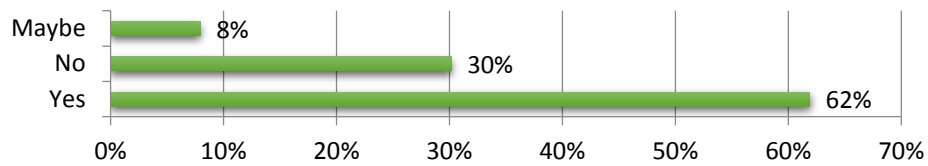
Figure 59: Historical Investment in facility (past 18 months)



Note: 115 respondents

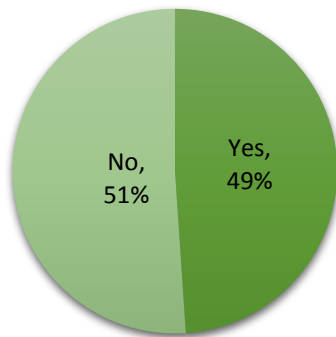
62% of respondents (78 businesses) indicated that there *was* room for expansion at their site, and 30% (38 businesses) indicated that there *was not* room at their site.

Figure 60: Room for expansion



Note: 126 respondents

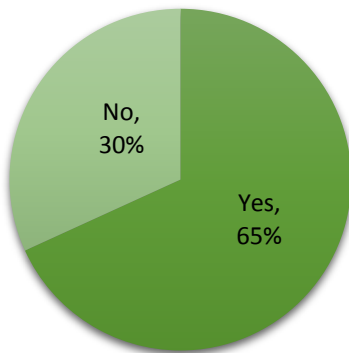
Figure 61: Plans to expand within three years



49% of respondents (69 businesses) plan to expand within three years, 51% (72 businesses) do not. Additionally, 33% (41 businesses) plan to expand in the next 12 – 18 months.

Note: 141 respondents

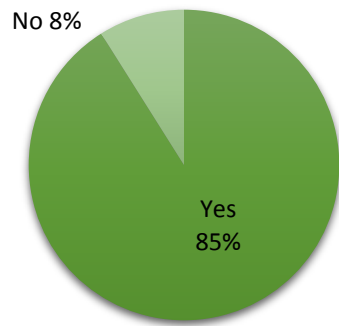
Figure 62: Adequacy of current site to support expansion



Of the 69 businesses planning expansion within the next three years, 65% (45 businesses) reported that their current site will be adequate. Notably however, 21 businesses (30%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 69 respondents

Figure 63: Expansion to occur in community

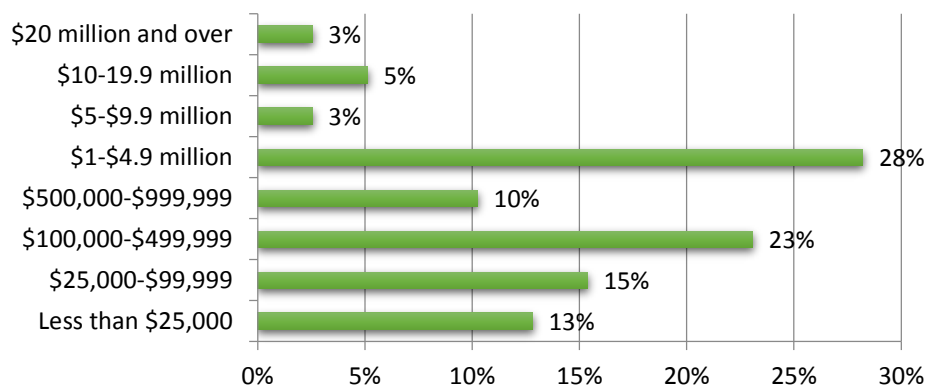


The vast majority of respondents (85% or 61 businesses) indicated that expansion will occur within the community.

Note: 72 respondents

The total investment anticipated for the planned expansion plans ranges substantially. 28% (11 businesses) anticipate investing between \$1 million and \$4.9 million, and an additional 23% (9 businesses) are planning investments in the range of \$100,000 to \$499,999.

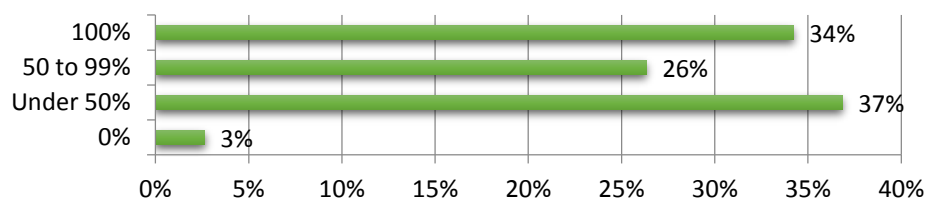
Figure 64: Estimated expansion investment



Note: 39 respondents

Of the 69 businesses planning expansion, 37% (14 businesses) responded to state that they expect to spend under 50% of their expansion budget on equipment and technology, while 34% (13 businesses) responded to indicate that 100% of their expansion budget will be devoted to equipment and technology.

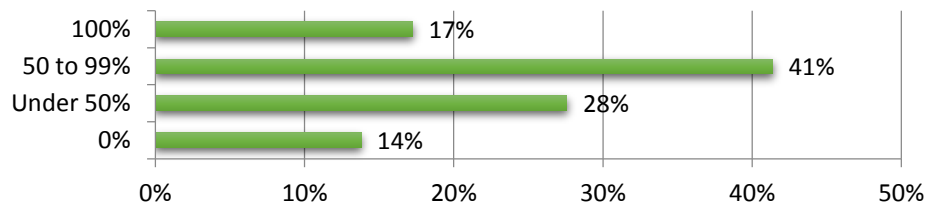
Figure 65: Component of expansion budget for equipment and technology



Note: 38 respondents

12 respondents (41% of businesses) expect to spend 50 - 99% of their expansion budget on real estate, while another 28% (8 businesses) expect to spend under 50%.

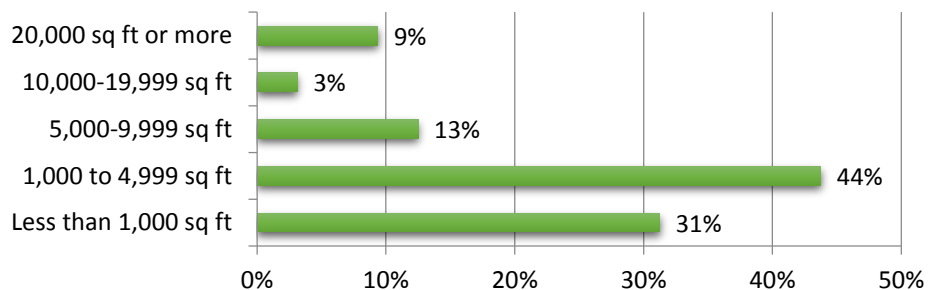
Figure 66: Component of expansion budget for real estate



Note: 29 respondents

44% (14 respondents) of businesses indicated that expansion plans will be between 1,000 and 4,999 square feet. 31% (10 respondents) of businesses anticipated an expansion of less than 1,000 square feet, while just four respondents (13%) expected an expansion of between 5,000 and 9,999 square feet.

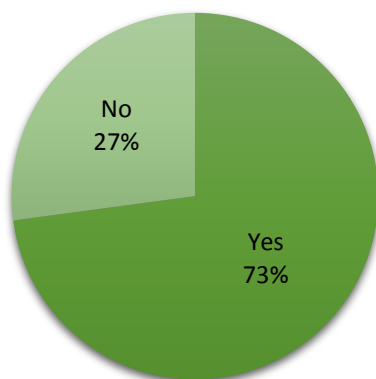
Figure 67: Size of facility expansion



Note: 32 respondents

Facility Upgrades

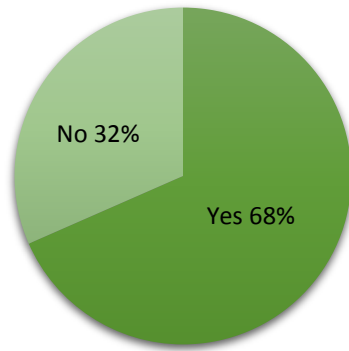
Figure 68: Recent facility upgrades



73% of businesses (43 businesses) indicated that there had been recent facility upgrades. Of those 43 businesses, 31% (13 businesses) indicated that those upgrades were completed in the last 12 months.

Note: 59 respondents

Figure 69: Planning facility upgrades

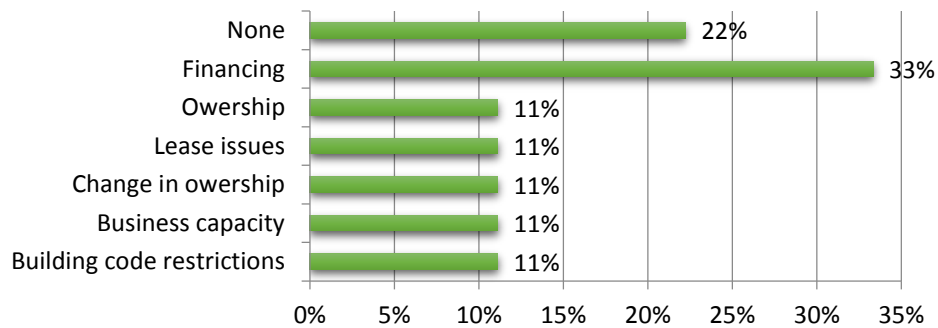


68% (39 businesses) indicated that they are planning facility upgrades, and 26% (10 businesses) anticipate those upgrades occurring within 3 months, and another 26% (10 businesses) expect them to occur within 6 months.

Note: 39 respondents

Respondents planning to upgrade were also asked to identify any barriers to upgrading. The most frequently cited barrier was financing (33% or 3 businesses).

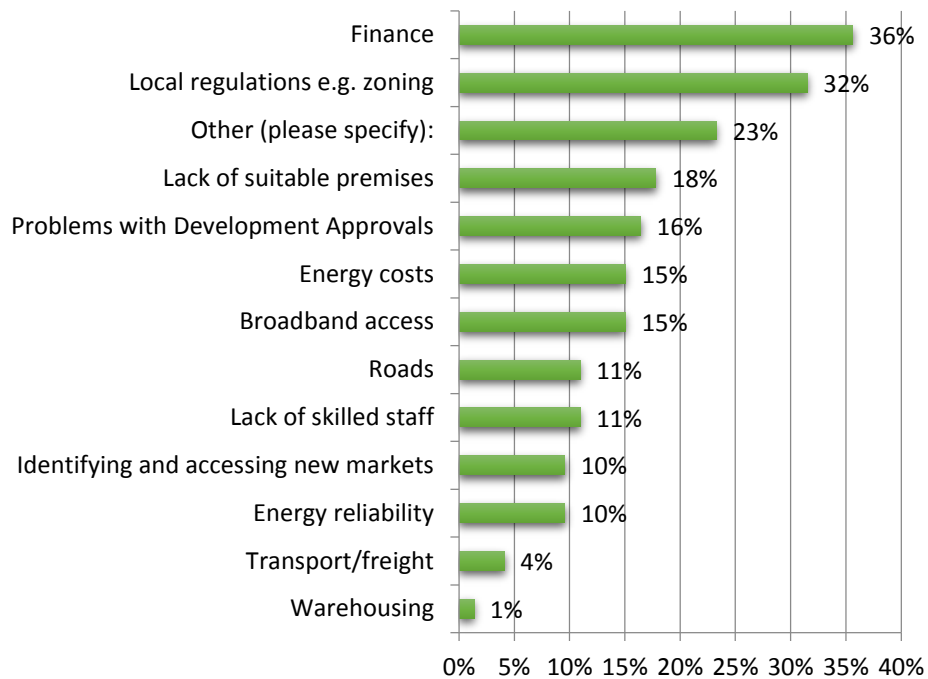
Figure 70: Barriers to upgrading



Note: 9 respondents

Respondents cited a variety of factors that act as constraints to their expansion. The most common of those were financing (36% or 26 businesses), local regulations (32% or 23 businesses), and lack of suitable premises (18% or 13 businesses). Refer to Appendix A for a list of the 'other' responses.

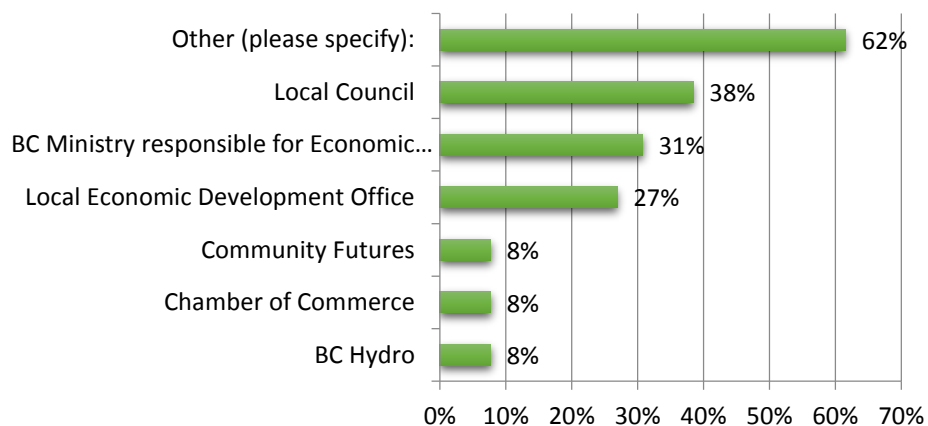
Figure 71: Barriers to expansion



Note: 73 respondents

49% of respondents (32 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest numbers had approached the local council (38% or 10 businesses), BC Ministry responsible for Economic Development (31% or 8 businesses), and the local Economic Development Office (27% or 7 businesses).

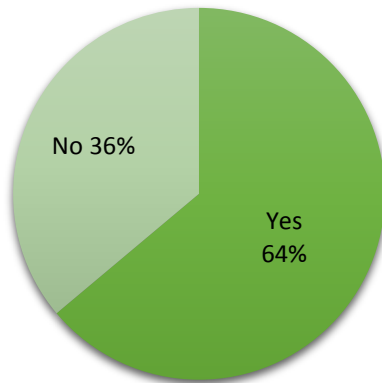
Figure 72: Organizations approached for expansion assistance



Note: 26 respondents

Energy Efficiency

Figure 73: Considering energy efficiency in expansion plans

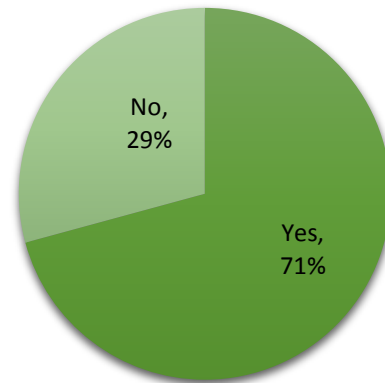


64% of those who responded (23 businesses) are considering energy efficiency in their expansion plans.

Note: 36 respondents

Figure 74: Awareness of BC Hydro Power Smart

71% of respondents (92 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.



Note: 130 respondents

GOVERNMENT SERVICES

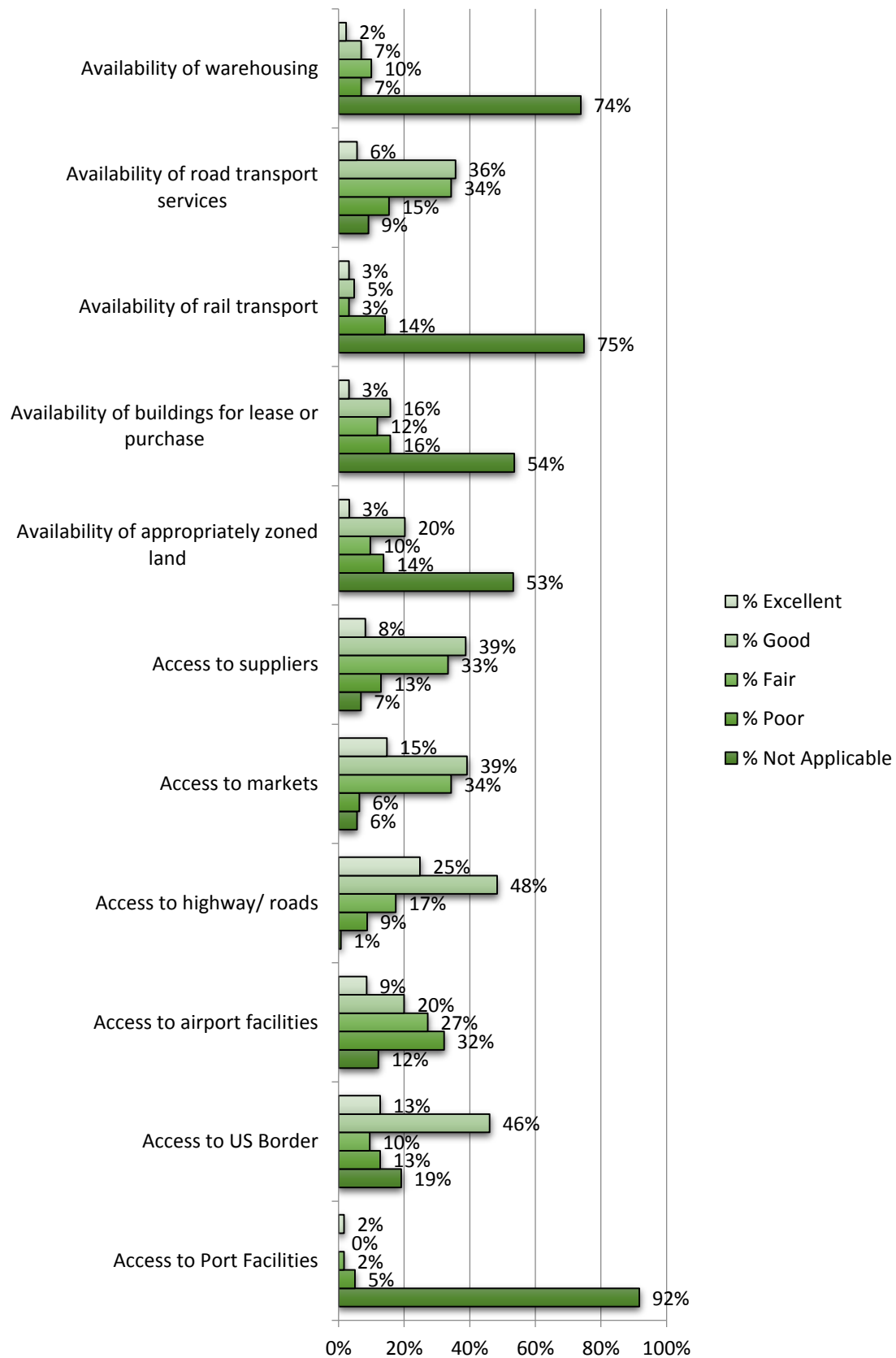
Respondents were asked to rate a list of government services as poor, fair, good, or excellent. Respondents also had the option to rate a service as not applicable to their business⁷.

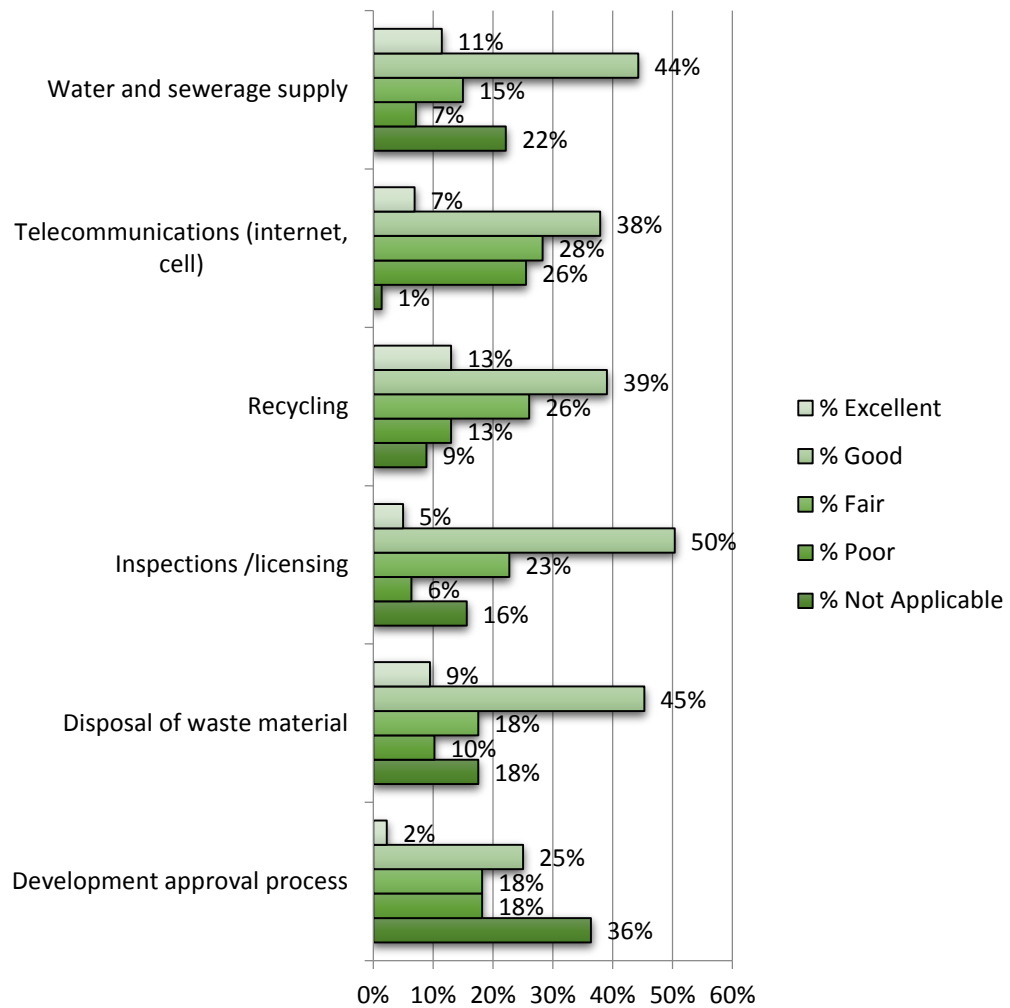
- The services that received the highest number of **POOR** ratings are access to airport facilities (32%), telecommunications (internet, cell service, etc.) (26%), and the development approval process (18%).
- The services that received the highest number of **FAIR** ratings were access to markets (34%), availability of road transport services (34%), and telecommunications (28%).

⁷ Only percentages are reported, as the number of respondents varied widely with each government service, resulting in numbers that are not comparable.

- The services that received the highest number of **GOOD** ratings were inspections and licensing (50%), access to highway/roads (48% or 72 businesses) and access to US border (46%).
- The services that received the highest number of **EXCELLENT** ratings were access to highway/roads (25%) and access to markets (15%).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (92%), availability of rail transport (75%) and the availability of warehousing (74%).

Figure 75: Rating of government services





Note: # of respondents varies

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 70% respondents (95 businesses) indicated they had suggestions. The highest number of responses (27% or 26 businesses) discussed expansion of the electronic communication services (cell phone, internet, broadband, fiber, etc.) along with improvements to highway and road quality and service (16% or 15 businesses), and improvements to the airport service (16% or 15 businesses).

Figure 76: Select responses in respondents' suggestions for improvements to government services

"Business Support Services - it would be nice to have someone local available to provide support for business support services."

"Work with Provincial and Financial government to fulfill promises of improving highways."

"Better cell reception for all carriers."

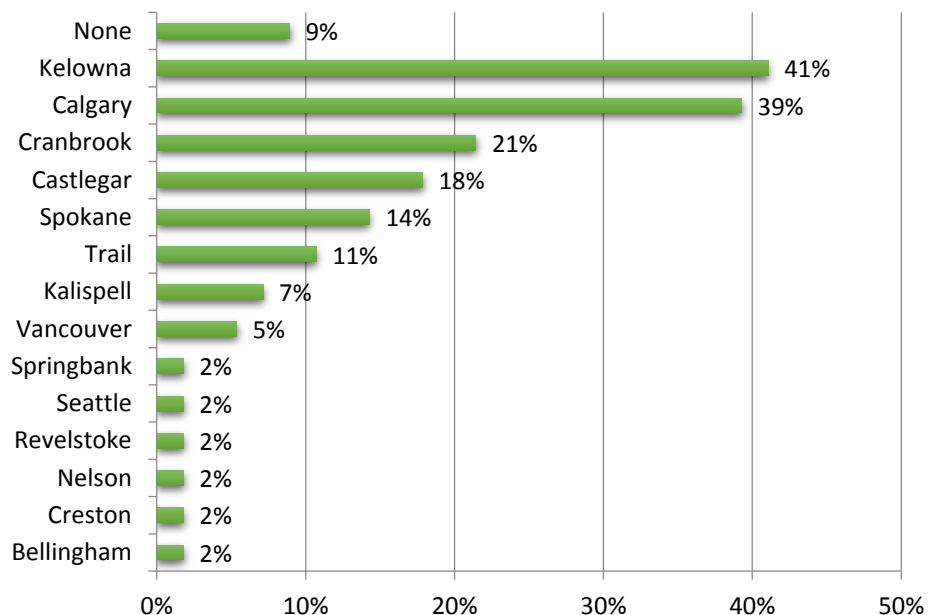
"Quality of transcanada highway affects tourists ability/ willingness to travel ... Maintenance and upkeep of highway needs to be addressed."

"Incentives on commercial real estate development."

Airport Service

The Kelowna International Airport is the most used airport, with 41% of respondents (23 businesses) indicating they use that airport. The Calgary International Airport was the second most used with 39% (22 businesses).

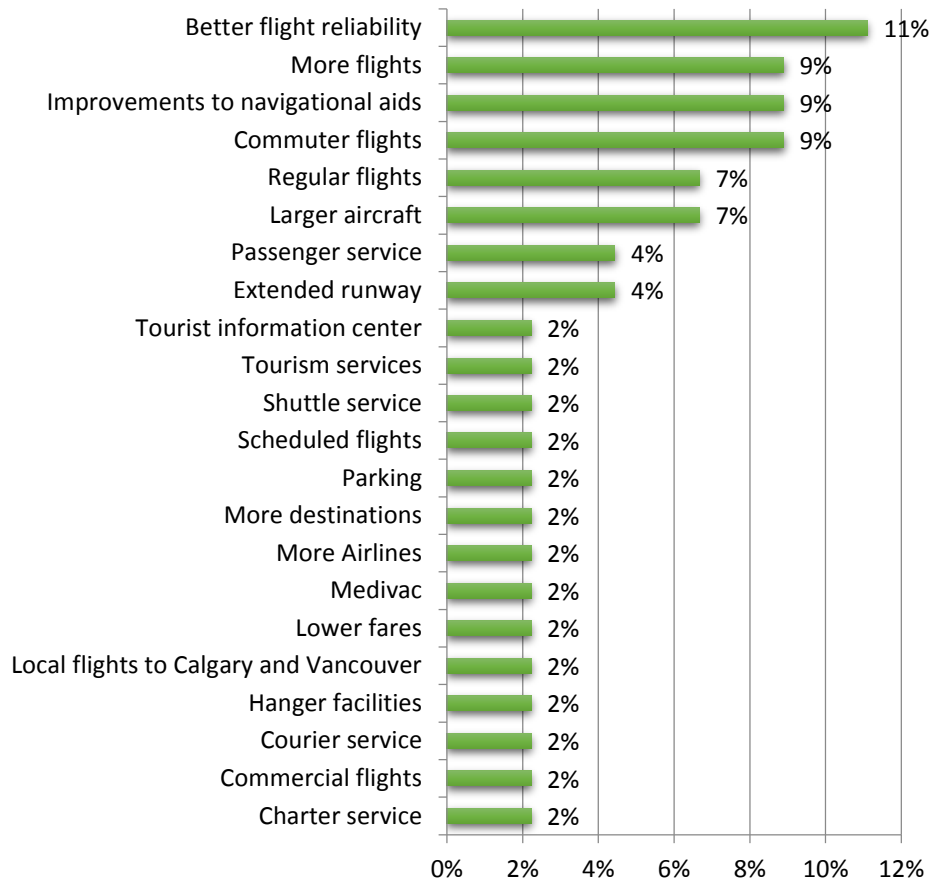
Figure 77: Airport service used



Note: 56 respondents

Respondents indicated that they would most like to see improved flight reliability (11% or 5 businesses), more flights (9% or 4 businesses), improvements to navigational aids (9% or 4 businesses), and commuter flights (9% or 4 businesses).

Figure 78: New services at local airport



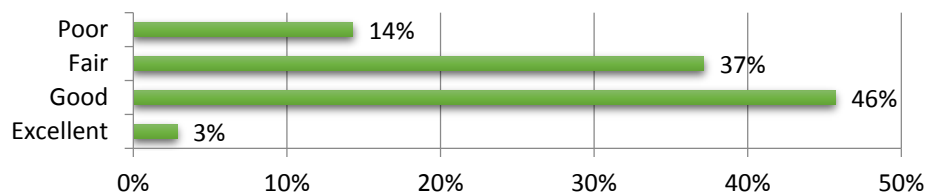
Note: 45 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as good (46% or 64 businesses).

Figure 79: Rating of local business climate

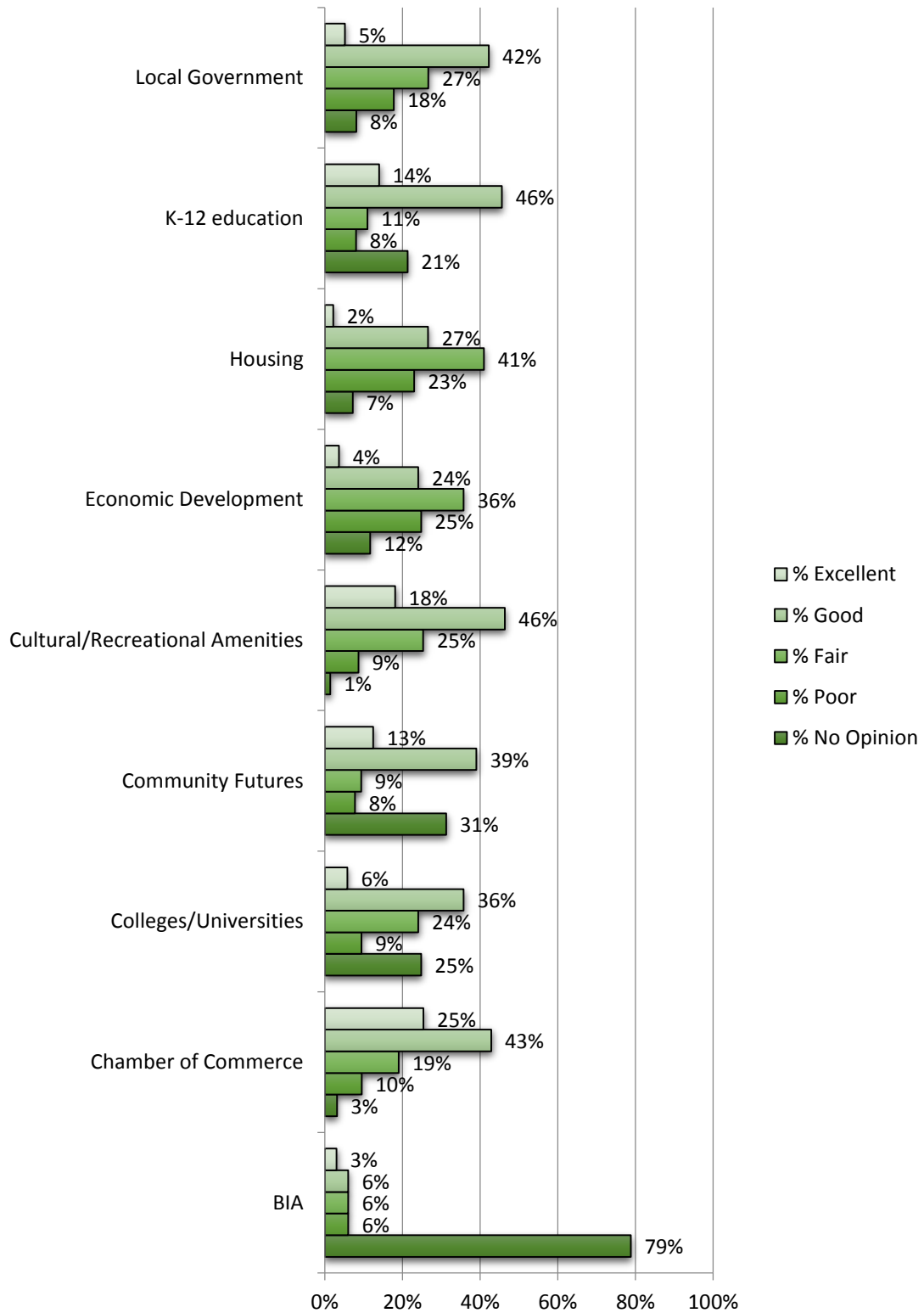


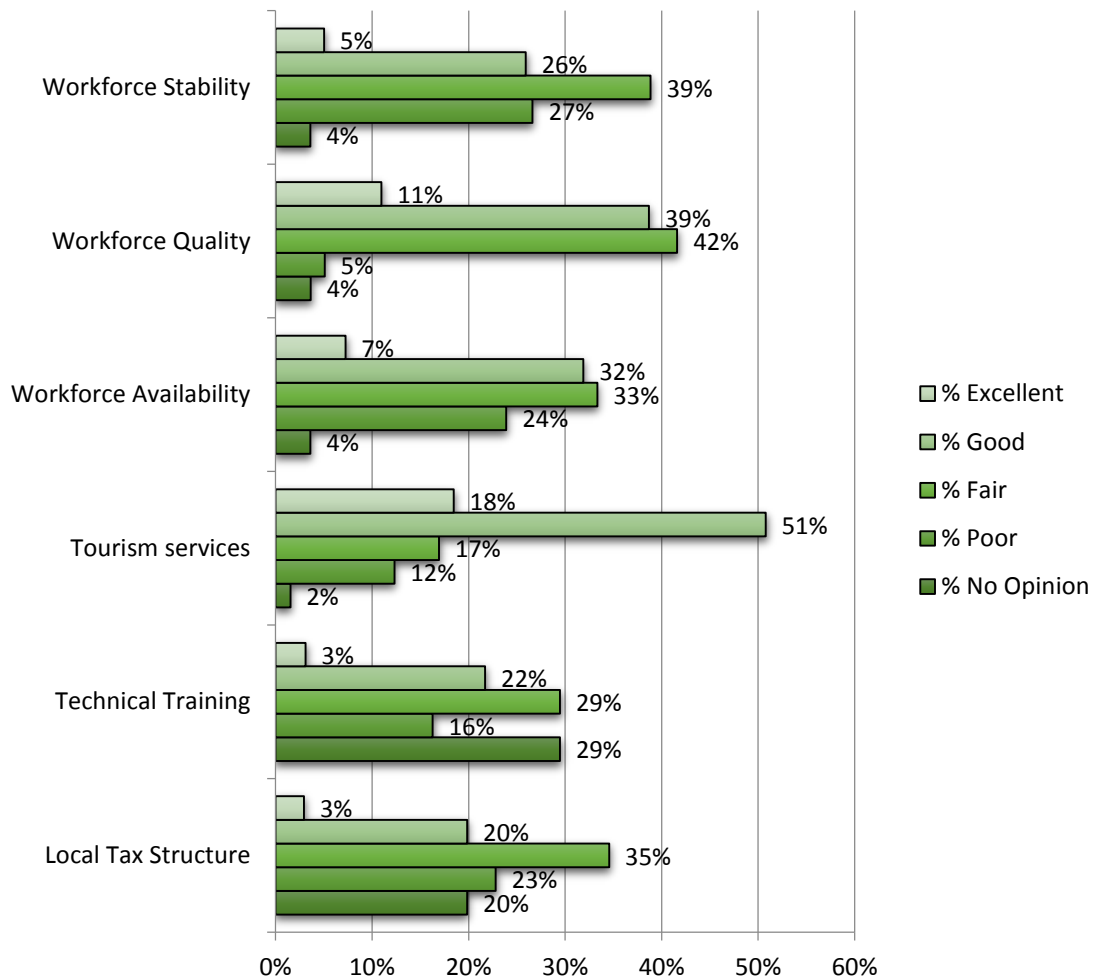
Note: 140 respondents

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

- The factors that received the highest number of **POOR** ratings included workforce stability (27% or 37 businesses), economic development (25% or 34 businesses), and workforce availability (24% or 33 businesses).
- The factors that received the highest number of **FAIR** ratings included workforce quality (42% or 57 businesses), housing (41% or 57 businesses), workforce stability (39% or 54 businesses), and economic development (36% or 49 businesses).
- The factors that received the highest number of **GOOD** ratings included tourism services (51% or 33 businesses), K-12 education (46% and 62 businesses), and cultural/recreational amenities (46% or 62 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included chamber of commerce (25% or 16 businesses), cultural and recreational amenities (18% or 25 businesses), and tourism services (18% or 12 businesses).
- The factors that received the highest number of **NO OPINION** ratings include Business Improvement Associations (BIA) (79% or 26 businesses) and Community Futures (31% or 20 businesses).

Figure 80: Rating of business climate factors

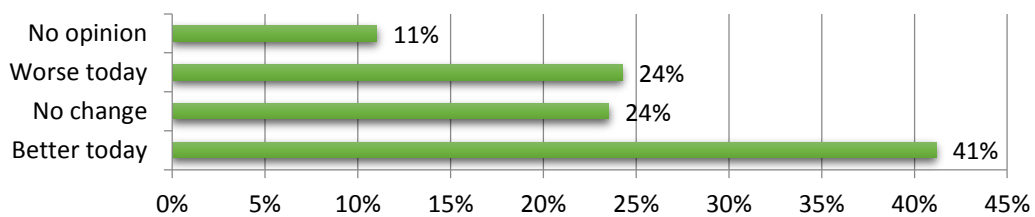




Note: # of respondents varies

41% of respondents (56 businesses) felt that the business climate is better today than it was 5 years ago. 24% (33 businesses) thought that it is worse, and 24% (32 businesses) believed there was no change in the business climate. The main reasons given from those who believe the business climate is worse is the declining economy (28% or 9 respondents) and business failures (13% or 4 respondents).

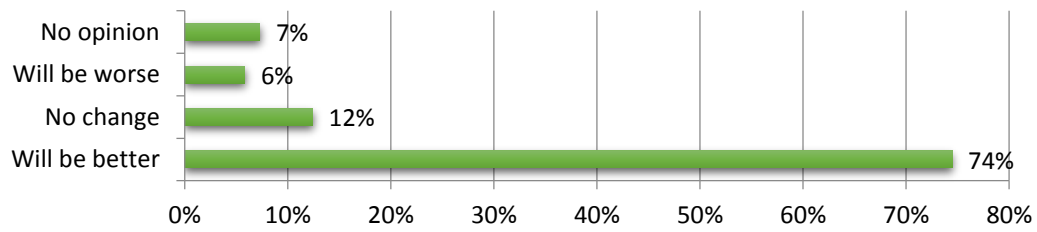
Figure 81: Business climate today vs. 5 years ago



Note: 136 respondents

74% of respondents (102 businesses) expect that the business climate will be better 5 years from today. 6% (8 businesses) expect that it will be worse.

Figure 82: Business climate 5 years from today

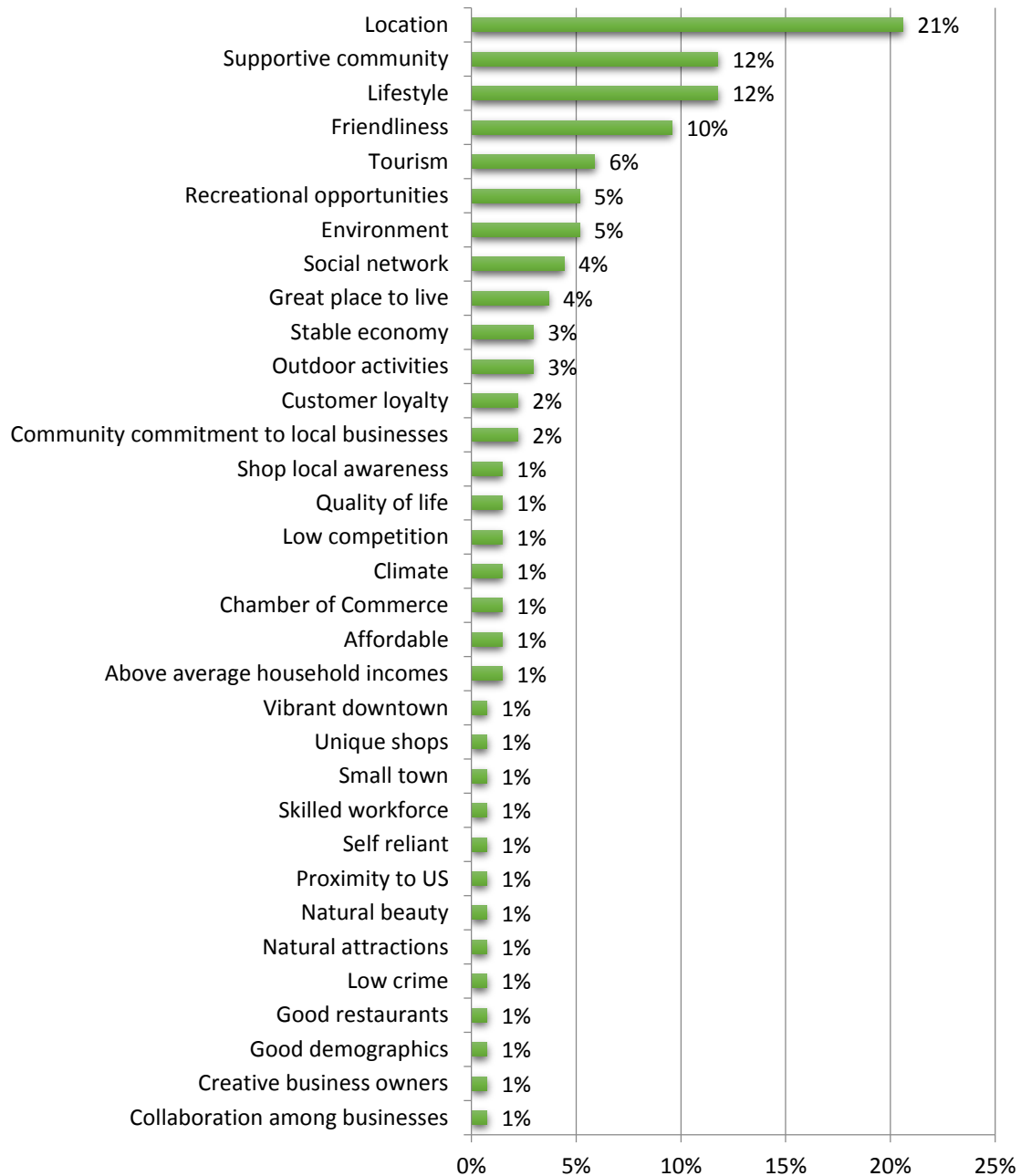


Note: 137 respondents

Strengths and Weaknesses of Business Climate

147 responses were provided when respondents were asked to list the community's strengths as a place to do business; the highest number of responses (21% or 28 responses) cited the location as the community's primary strength. 12% (16 businesses) indicated the supportive community and 12% (16 businesses) indicated the lifestyle.

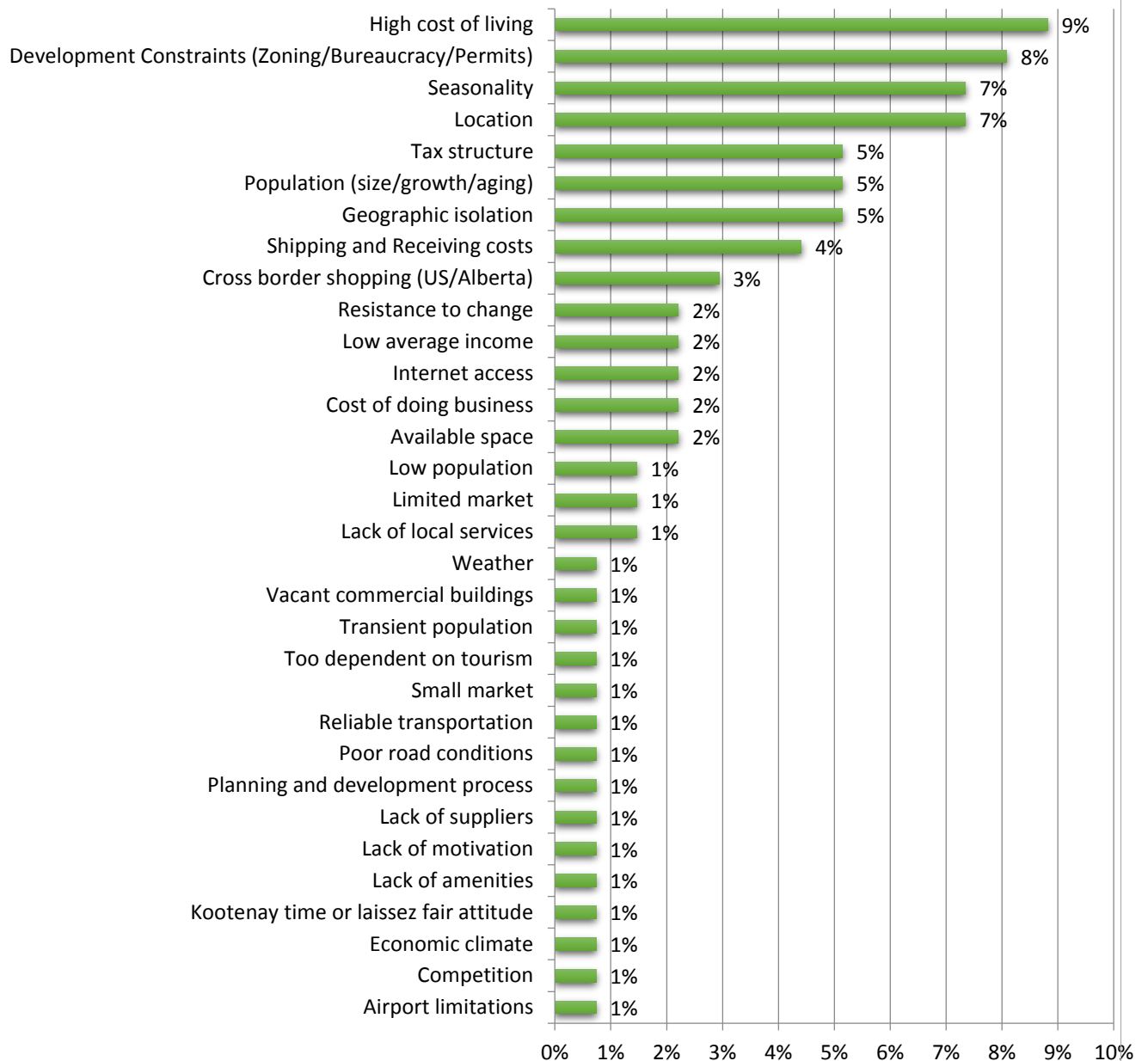
Figure 83: Community's strengths as a place to do business



Note: 136 respondents

Respondents were asked to list the community's weaknesses as a place to do business. The highest number of responses (9% or 12 respondents) were received for the high cost of living. Development constraints were cited by 8% of respondents (11 businesses), and the seasonality and location were both cited by 7% (10 respondents) of businesses.

Figure 84: Community's weaknesses as a place to do business



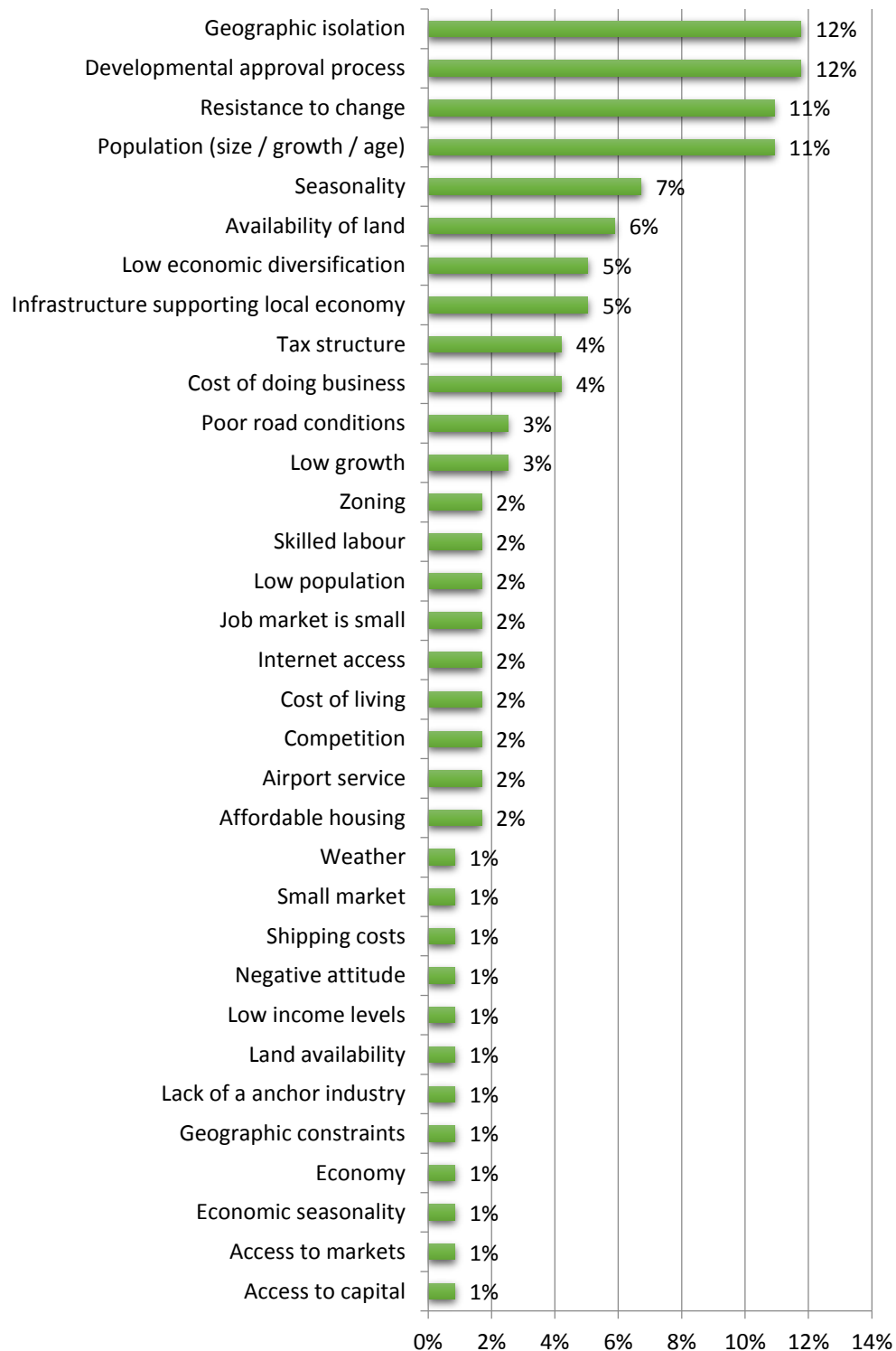
Note: 136 respondents

Business Growth

85% of respondents (121 businesses) indicated that there are barriers to growth. The highest number of respondents (12% or 14 businesses respectively) stated that geographic isolation and the development approval process are important barriers to growing the community's economy.

Other commonly cited barriers include the resistance to change (11% or 13 businesses) and population (size/growth/age) (11% or 13 businesses).

Figure 85: Barriers to growth in the community



Note: 119 respondents

The following excerpts illustrate the barriers cited:

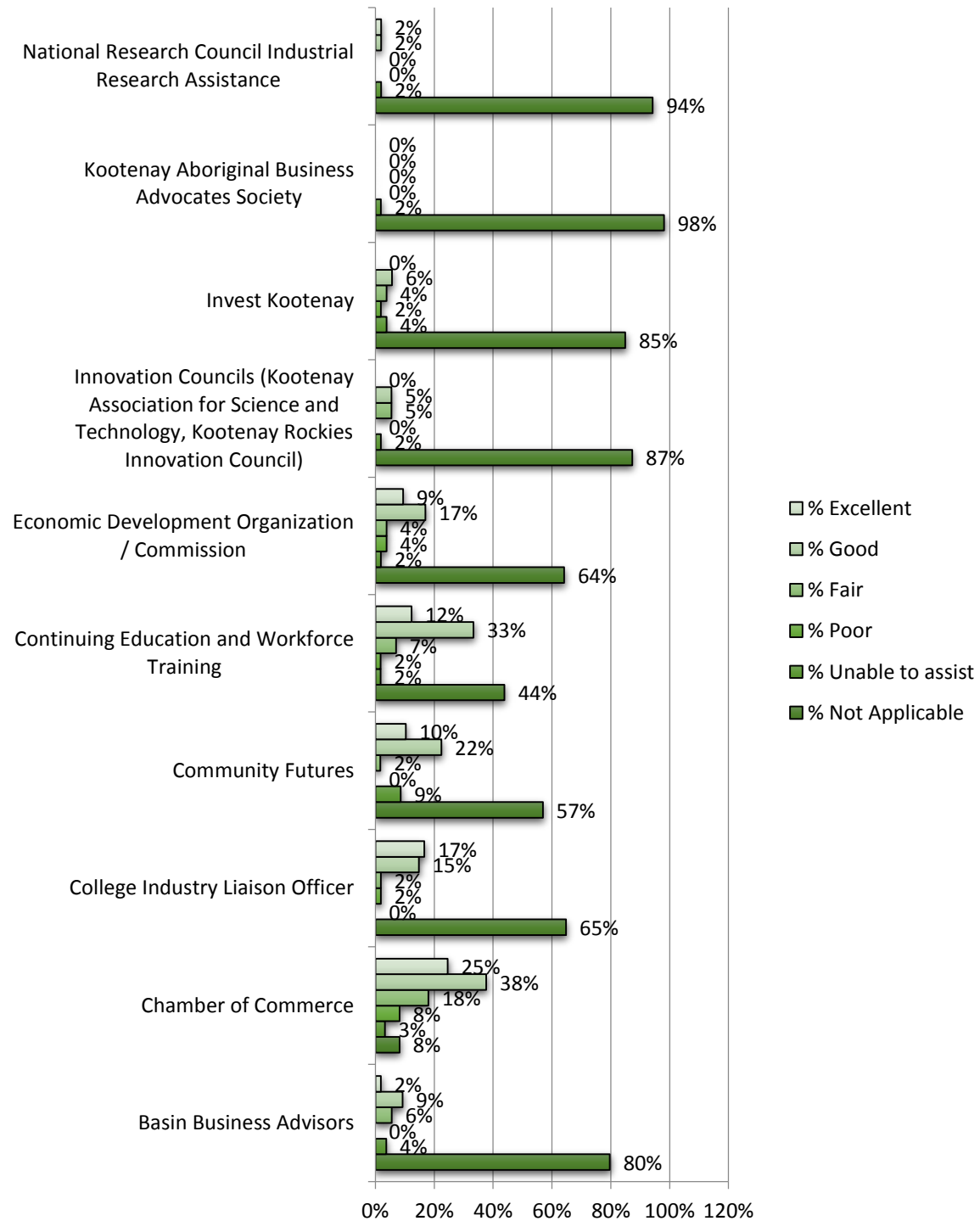
“Tourists do not stay for an extended time.”

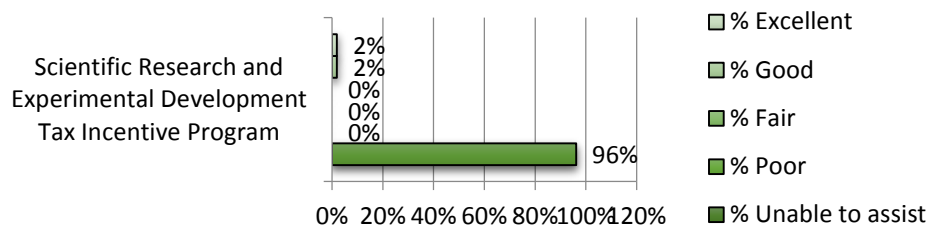
“Lots of red tape when setting up or doing expansions on properties.”

“Letting growth happen (not in my backyard - NIMBY - opposition).”

Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest poor response (8% or 5 businesses), but was also cited as providing an excellent level of service by 25% of respondents (15 businesses) and a good level of service by 38% of respondents (23 businesses). Respondents found Community Futures (9% or 5 businesses) as most commonly unable to assist.

Figure 86: Level of service from business support providers

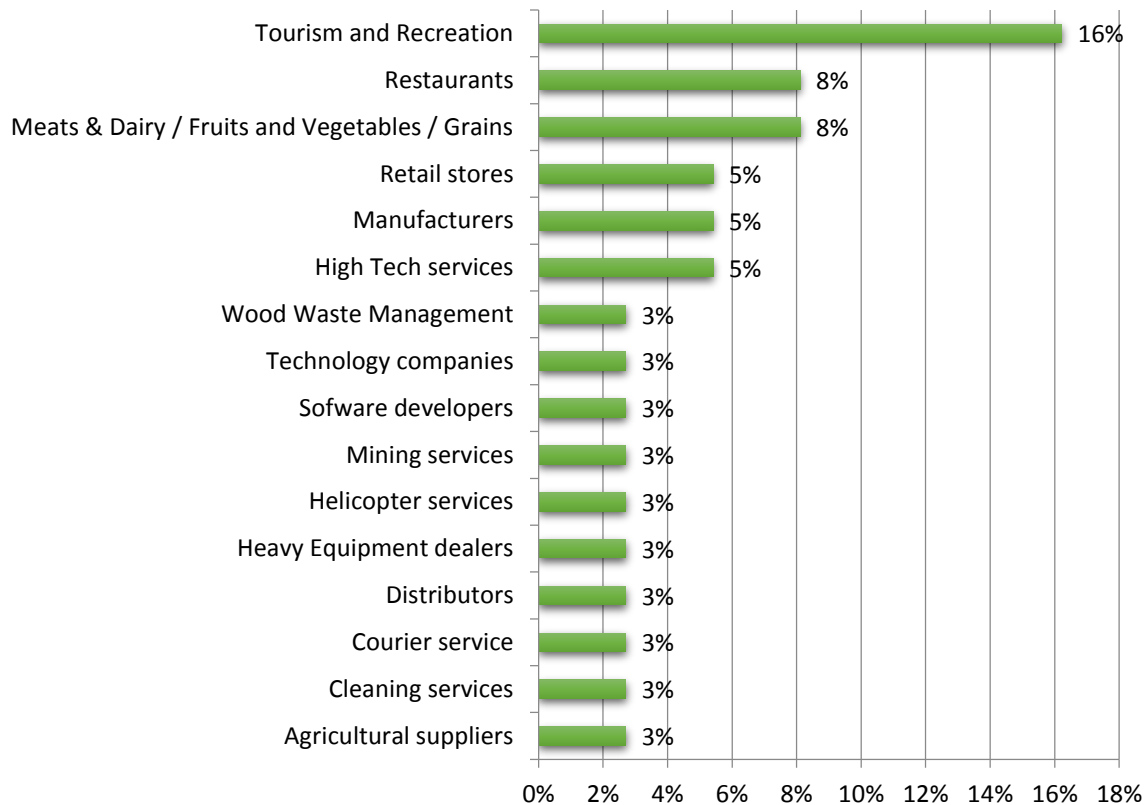




Note: # of respondents varies

33% of respondents (44 businesses) indicated that there are suppliers that could locate in the region that do not currently serve the area. Tourism and recreation suppliers were most commonly cited by 16% of respondents (6 businesses).

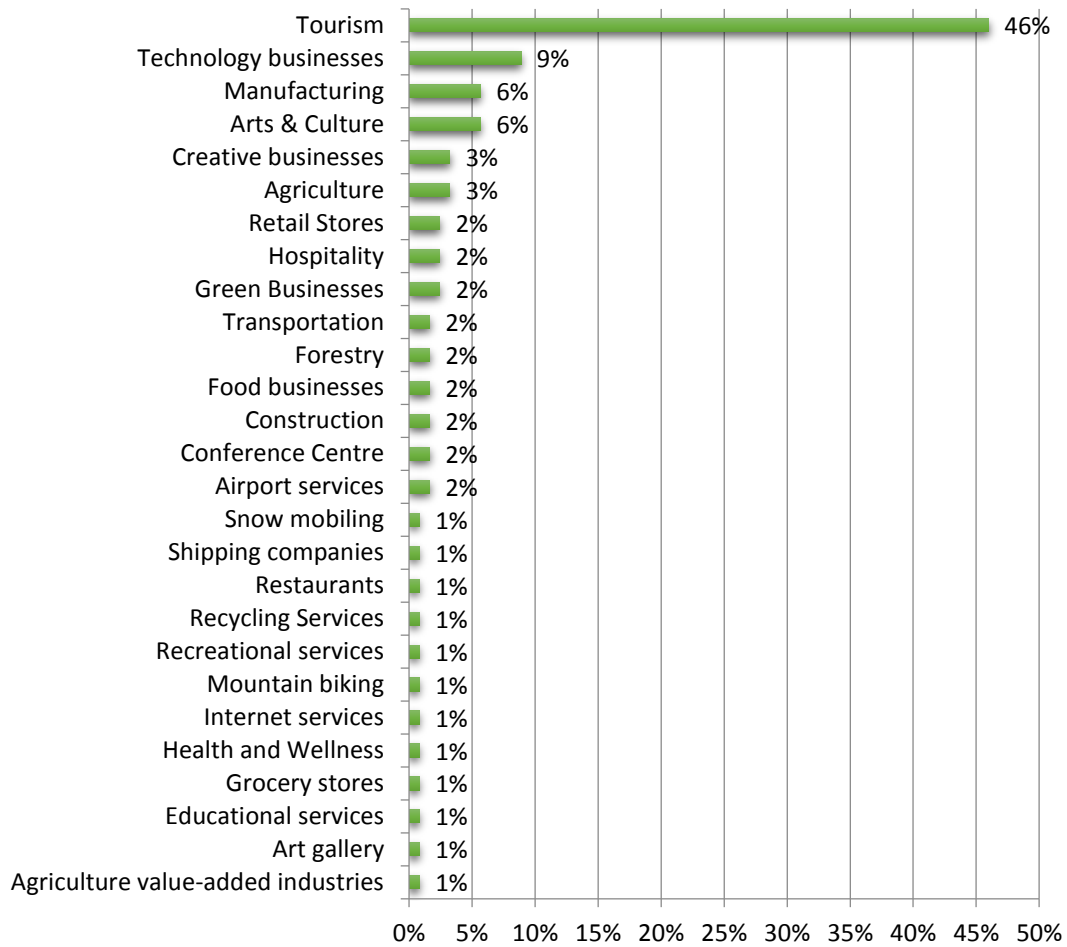
Figure 87: Potential Suppliers



Note: 37 respondents

When asked what business, sector, or industry could be attracted to most strategically benefit the industry, the most common response was tourism (46% or 57 respondents), technology businesses (9% or 11 businesses), manufacturing (6% and 7 businesses), and arts and culture (6% or 7 businesses).

Figure 88: Sectors, businesses or industries that could be attracted to region

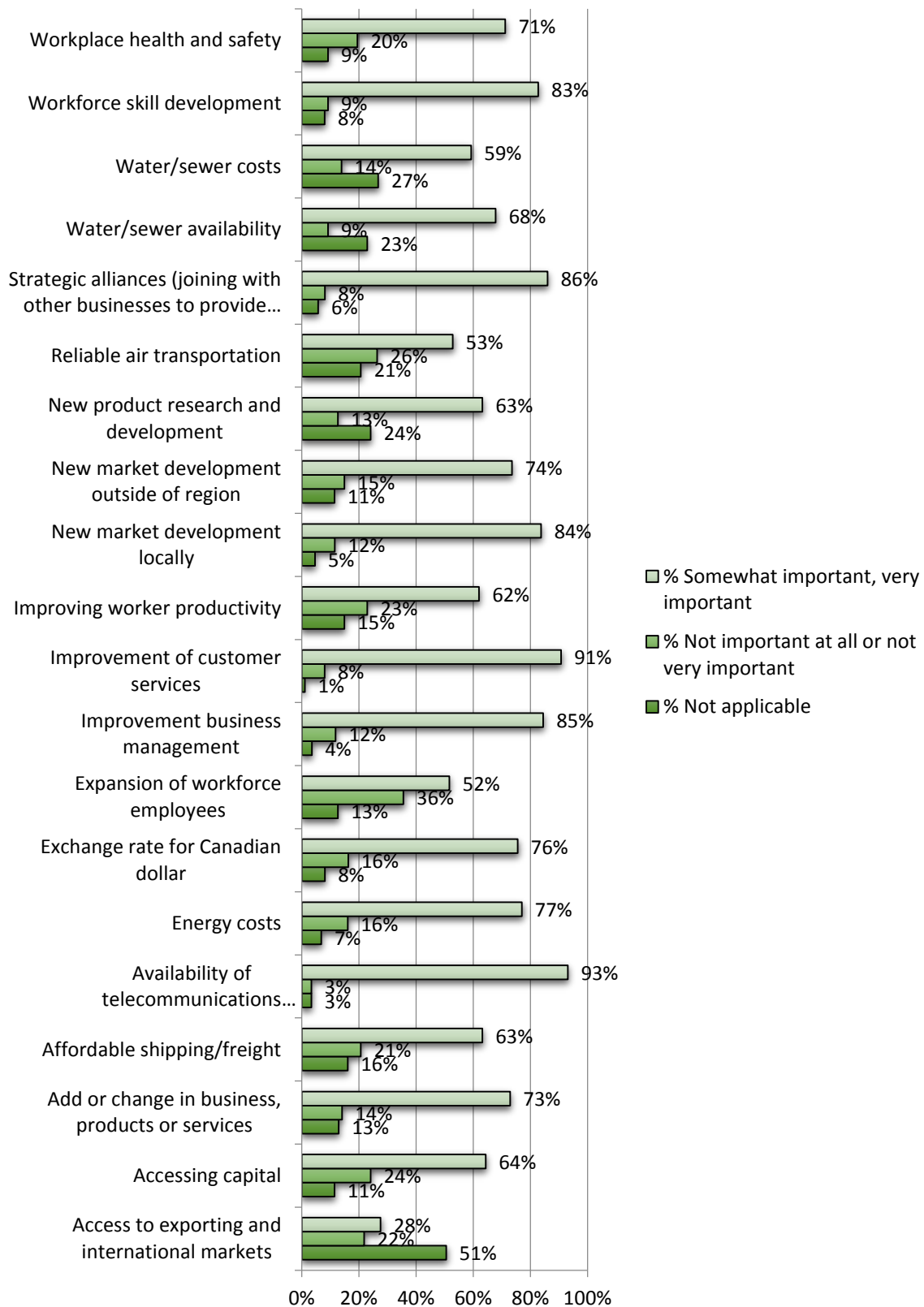


Note: 124 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include availability of telecommunications infrastructure and services (93% or 81 businesses) and improvement of customer service (91% or 79 businesses).

Figure 89: Importance of business competitiveness factors

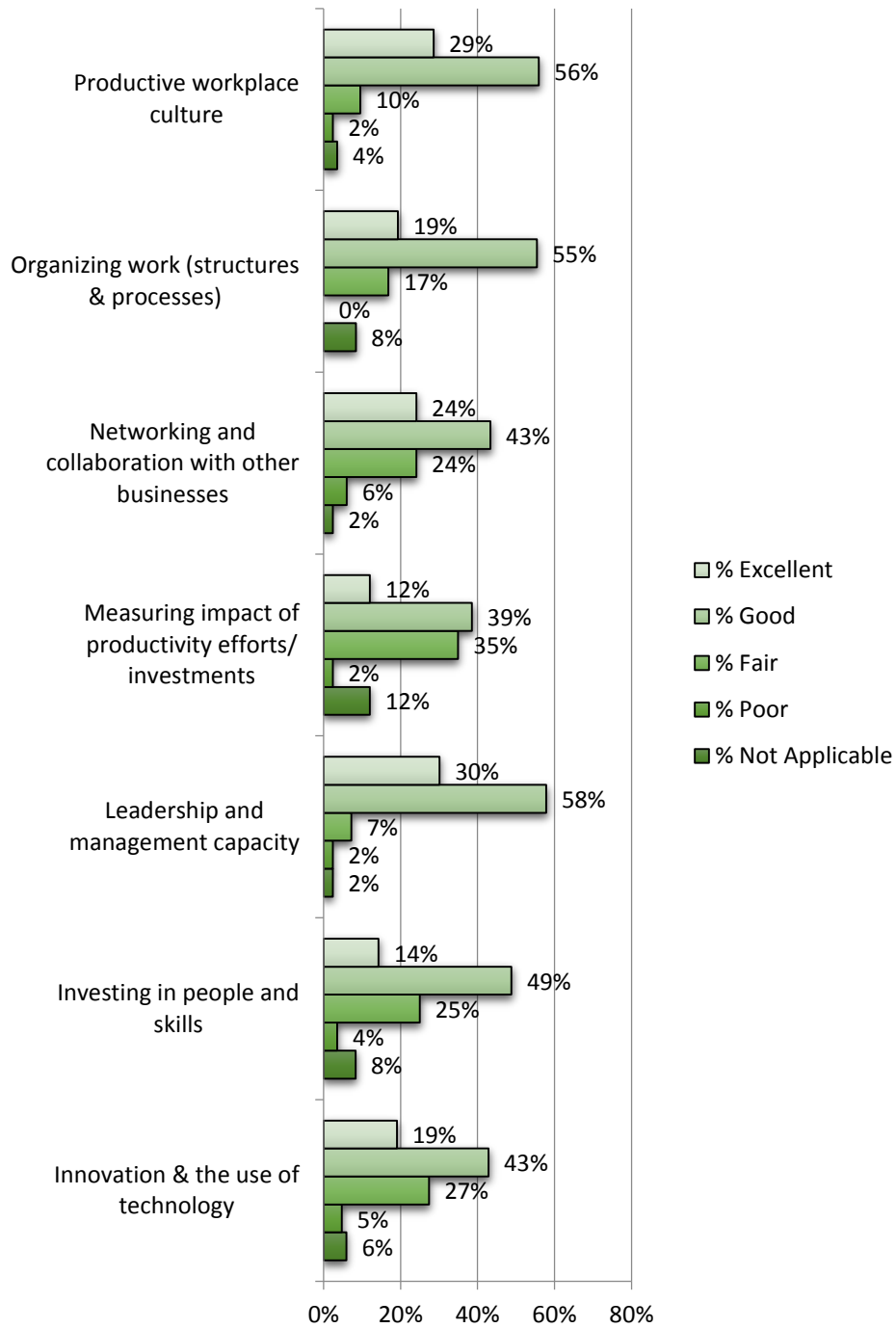


Note: # of respondents varies

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

- **EXCELLENT** ratings include leadership and management capacity (30% or 25 businesses) and productive workplace culture (29% or 24 businesses);
- **GOOD** ratings include leadership and management capacity (58% or 48 businesses), productive workplace culture (56% or 47 businesses), and organising work (structures and processes) (55% or 46 businesses);
- **FAIR** ratings include measuring impact of productivity efforts/investments (35% or 29 businesses);
- **POOR** ratings include networking and collaboration with other businesses (6% or 5 businesses).

Figure 90: Performance on key productivity drivers

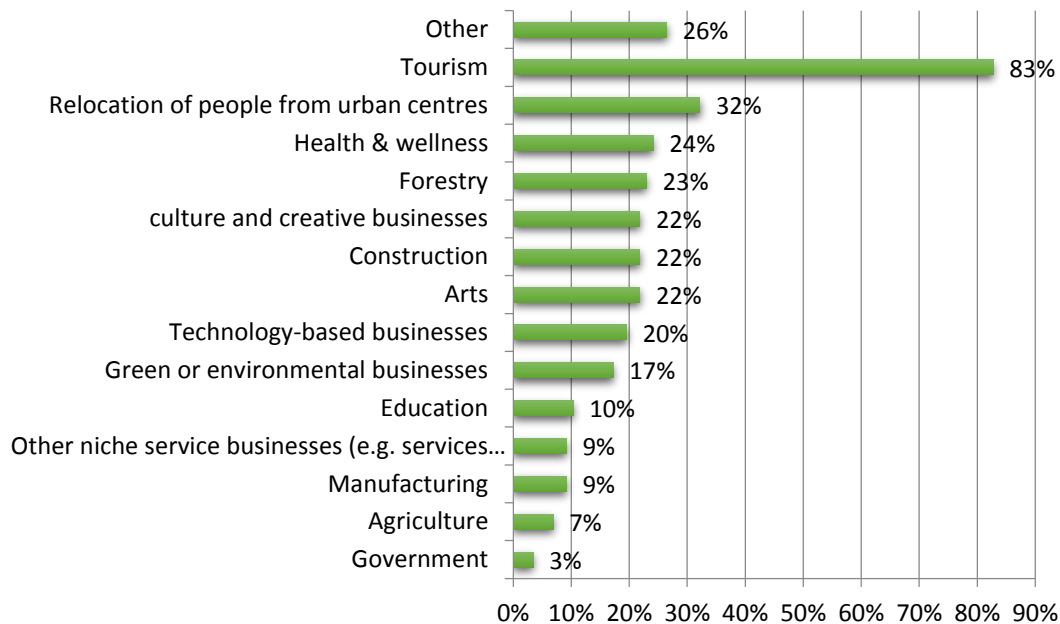


Note: # of respondents varies

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (83% or 72 businesses), relocation of people from urban centres (32% or 28 businesses), health and wellness (24% or 21 businesses), and forestry (23% or 20 businesses). For a list of drivers identified as “other”, refer to Appendix A.

Figure 91: Economic drivers with greatest growth potential

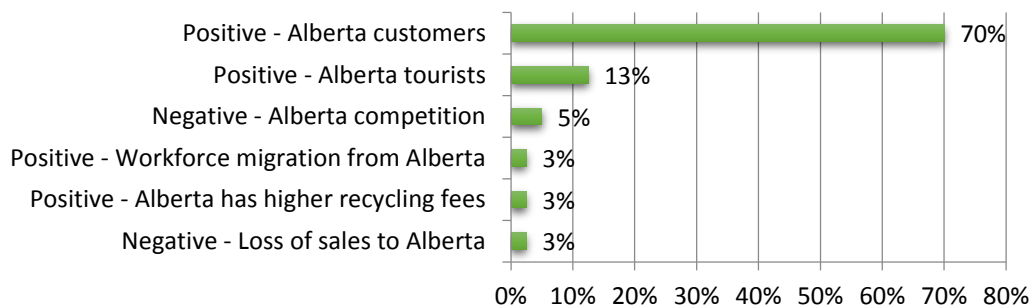


Note: 87 respondents

Proximity to Alberta

42 respondents (79%) reported that they were impacted by their proximity to Alberta. The general positive impact of the customer base coming from Alberta was the most significantly noted by 70% of respondents (28 businesses), while 13% (5 businesses) indicated a similar positive impact of tourists coming from Alberta.

Figure 92: Impact of Proximity to Alberta



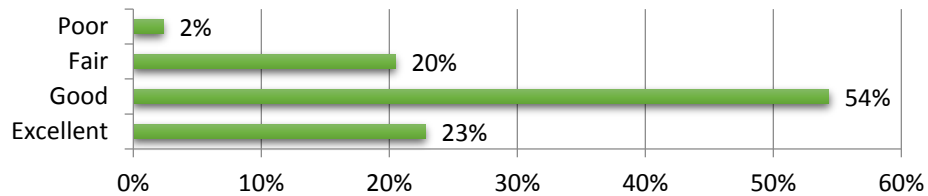
Note: 40 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (55% or 69 businesses), 23% (29 businesses) reported that their facility's health is excellent, and 20% (26 business) reported that it is fair. 2% (3 businesses) of respondents indicated that their company is in poor health.

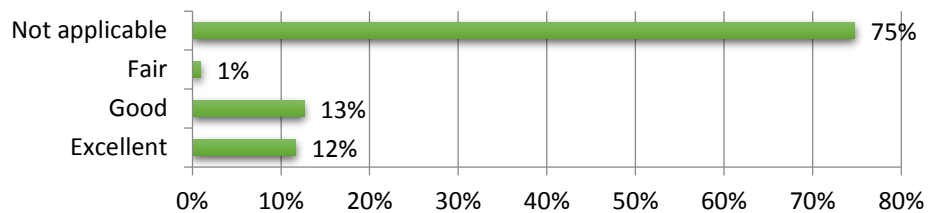
Figure 93: Facility's overall health



Note: 127 respondents

Most businesses with a parent company indicated that the health of that parent company is good (13% or 13 businesses).

Figure 94: Overall health of parent company

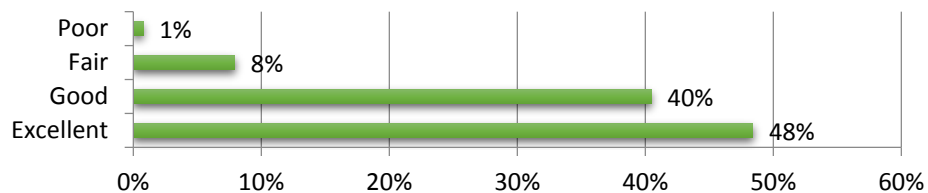


Note: 103 respondents

Attitude toward Community

48% of respondents (61 businesses) indicated that their local management's attitude toward the community is excellent and 40% (51 businesses) indicated that it is good.

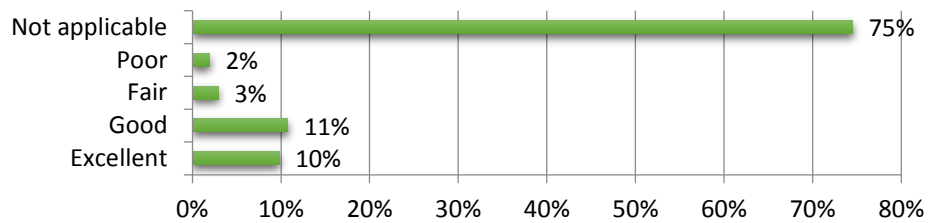
Figure 95: Local management's attitude toward community



Note: 126 respondents

Respondents indicated that their parent company's attitude toward the local community is most commonly good (11% or 11 businesses) or excellent (10% or 10 businesses).

Figure 96: Parent company's attitude toward local community

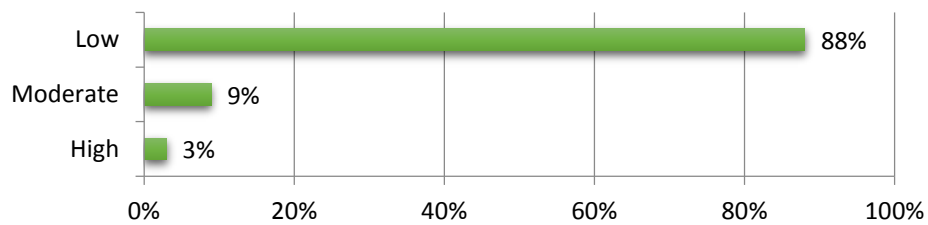


Note: 102 respondents

Risk of Closing or Downsizing

Data indicates that the risk of tourism related businesses closing is low. Just 3% (4 businesses) of the respondents reported that they are at a high risk of closing in the next 1-3 years, and just 9% (12 businesses) indicated they were at a moderate risk.

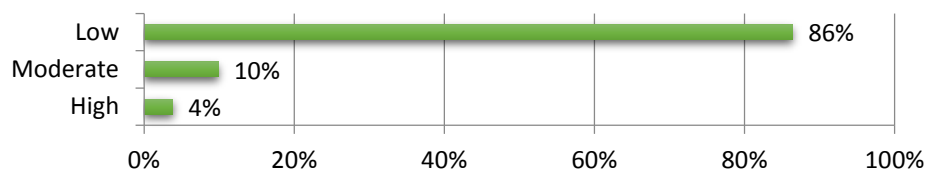
Figure 97: Risk of facility closing



Note: 134 respondents

Similarly, the data indicates that the risk of downsizing is low, with just 4% (5 businesses) indicating that the risk is high.

Figure 98: Risk of facility downsizing



Note: 132 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used to inform short- and long-term business retention and expansion action planning at the regional, sub-regional, or community scale. Additionally, the regional overview of the tourism sector that this report provides may encourage or support future collaboration amongst stakeholder groups. Many Business Retention and Expansion (BRE) programs attempt to 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”).

As this study was commissioned by the Columbia Basin RDI, the immediate follow-up steps will be the distribution of the report to all potentially interested organizations with an offer to discuss further how this report may help them.

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

Some communities/stakeholder groups 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 be taken by stakeholders in the tourism sector to support links to planning and action:

1. Continually communicate (through press, presentations, electronic media, etc.) with the business community regarding actions and be clear that the actions are tied to the BRE process.
2. Build on the momentum of the BRE report and ensure actions and next steps are taken and kept on track. Include follow-up discussions with individual businesses (particularly to address red and green-flags). Consider using the “Business Walk” survey as a tool to connect with businesses annually.
3. Host a business stakeholder forum to present findings, discuss common issues and potential solutions.
4. Host a facilitated action planning session with economic development stakeholders and industry representatives.
5. Based on results from the forums and action planning session, finalize priority actions, develop related action plans, update existing economic development plans and develop

relationships with a broader network of support providers (at regional, provincial and national scales) to support implementation.

6. Establish a monitoring program to assess the impact of implementation efforts.

POTENTIAL ACTION AREAS

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 4,071 employees. 41% of employees are full-time, followed by 35% part-time employees, and 24% are temporary. The size of the workforce appears stable and healthy, with 48% of businesses indicating that the number of employees at their business has stayed the same. Anticipated employment trends are also stable with the majority of businesses expecting the number of casual, part time and full time employees to stay the same or slightly increase. The majority of businesses (87%) recruit locally. 40% of businesses indicate that they currently face recruitment challenges, 41% anticipate future difficulties, and 40% of businesses stated they did believe there were strategies that could address recruitment.

Respondents most commonly rely on advertising and word of mouth when recruiting, followed by online job boards. Actions identified by respondents that could prove helpful include: improved job advertising, assistance with the foreign worker program, and supporting affordable housing. The hospitality and food/beverage service industries featured in areas of future and current recruitment challenges, as did the area of administrative/clerical. Related to recruitment and retention, are the critical considerations for employees identified which include the cost of living, housing, and transportation.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with just 10% of essential employees under the age of 25. Increasing youth employment may assist in addressing the recruitment challenges that 40% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

50% of businesses in the region report being in a growth cycle and 37% are maturing, and similarly 53% indicate the status for their product/service is stable and 38% indicate it is increasing. The majority of businesses are anticipating low to moderate sales growth over the next year, with 40% expecting moderate sales growth between 1 – 9% and 30% expecting 10-24% sales growth. 43% of businesses indicate that the majority of their sales are to local markets, with 21% indicating their sales are to a national market. Further review into this is warranted to understand how this correlates to the geographic source of tourists. 49% indicate that they are planning to expand within the next three years. Over half (65%) of those businesses planning to expand feel their existing site is adequate, and 85% indicated that expansion would occur within the community. Businesses also report that employment rates are stable, and that they anticipate continued stability over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive, stable report on business conditions in the tourism sector. Actions in this area could include supporting existing businesses as they plan for

local expansion/growth. Support could come in the form of assistance with navigating local regulations, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to expansion which include geographic isolation, difficulties with the development approval process, general community resistance to change, and the population (demographics, size, etc.). It is worth noting that just less than half (49%) of businesses sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small to medium in size (38% have fewer than five employees, 51% are located in a facility that is less than 4,999 sq.ft., and 54% have annual sales under \$1 million) and independent (just 22% have other locations). The customer base for businesses appears to be diverse, with 59% of businesses indicating that just 1 - 9% of their sales are generated by their top three customers. It is noteworthy that temporary employees make up just 24% of the workforce. Tailoring supports and services to small/medium sized, independent businesses will benefit businesses in the tourism sector. Services and supports should consider that 96% of functions provided by a business are 'services'. Actions to support and encourage small and medium sized businesses could include specific training targeted to the needs of small businesses and an exploration of shared service provision in the areas of payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include promoting existing supports available from Small Business BC, Destination BC, Kootenay Rockies Tourism, and the Basin Business Advisors Program.

Supply Sourcing and Procurement

The data indicates that 44% of supplies come from within the local region. The most common response (84%) for the reason why supplies are sourced outside of the local area is that they are not available locally. The ability to source local supplies of meats, dairy, fruits, vegetables and grains were the most frequently desired by respondents. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area businesses could also be explored. A regional stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 50% of businesses *do* have a training budget and 66% indicated that training typically occurs locally. Just 38% of businesses were aware of new trends, technologies and industry changes that will require new skills, indicating that there is room for education among businesses on the latest trends and technologies specific to the tourism

sector. 74% identified specific areas for current training/professional development, and those include safety/first aid/food safe and customer service. Respondents also indicated that over the next five years additional training in marketing/social media and computer and technology training would be needed. There is a preference for classroom (58%) or individual coaching (49%) style formats. Future initiatives could include supporting networks to help businesses identify shared training needs, increasing awareness of new trends, technologies and changes to the tourism sector, and working with local educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 19% of respondents indicated that they have a formal succession plan and just over half (52%) have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses in the tourism sector. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future business planning support initiatives should be aggressively advertised to ensure uptake among businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Continued Support for Tourism Sector

An overwhelming 83% of respondents indicated that tourism was the economic driver with the greatest growth potential. 16% of Respondents also noted that suppliers of tourism and recreational services/products are potential suppliers that could be increased, and 46% indicated that attracting more tourism related businesses would most strategically benefit the industry. Actions to support the tourism industry could include continued collaboration between governments at all levels and local tourism agencies such as Destination British Columbia, Kootenay Rockies Tourism, local Destination Marketing Organisations, Chambers of Commerce, and local businesses. With most businesses (74%) expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Improving Connectivity

A recurring theme was the need to improve telecommunications services, with 26% of respondents rating the service as poor and 28% rating the service as fair. 93% of businesses rated the availability of telecommunications as somewhat important or very important to ensuring business competitiveness over the next five years. Discussions with telecommunication service providers to identify ways to improve service, as well as community discussions to identify specific areas for improvements would be beneficial to target improvements that would support the tourism sector.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1.: NAICS Classification	Total	
Transportation (48, 53)	14	9%
Accommodation & Food & Beverage Services(72)	66	43%
Recreation and Entertainment (71, 51)	68	45%
Travel Services (56)	4	3%
	152	100%

Figure 2.: Industry Classification by Region			Count	Percent of Question Respondents
Industry Classification by Region	RDI Region	Year		
Tourism	Cranbrook	2014	1	1%
	Creston & Area	2016	8	5%
	Fernie & Area	2012	1	8%
		2016	10	
	Golden	2013	31	23%
		2014	5	
	Kaslo	2014	1	6%
		2015	7	
	Kimberley	2014	10	7%
	Boundary	2012	4	3%
	Lower Columbia	2012	9	6%
	Nakusp	2013	5	3%
	Nelson & Area	2015	13	9%
	Revelstoke	2015	23	15%

	Rossland	2012	6	4%
	Slocan Valley	2013	12	9%
		2014	2	
	Sparwood	2013	2	2%
		2014	2	
Total			152	100%

Survey Participants: 152
 Question Respondents: 152
 No Response Count: 0
 Response Rate: 100%

Figure 3.: Functions located at this facility	Count	Percent of Question Respondents
Engineering/RD	4	5%
Distribution	5	7%
Warehousing	5	7%
Manufacturing	10	14%
Headquarters	15	21%
Services	65	89%
Total	104	

Survey Participants: 75
 Question Respondents: 73
 No Response Count: 2
 Response Rate: 97%

Figure 4.: Who are your competitors?: Where are your competitors located?	Count	Percent of Question Respondents
In Canada	2	3%
In Province	6	10%
Outside Canada	7	12%
In Region	46	78%
None	3	5%
Total	64	

Survey Participants: 152
 Question Respondents: 59
 No Response Count: 93
 Response Rate: 39%

Figure 5.: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Diversified product / services	1	0.77%
Knowledgeable staff	1	0.77%
Niche market	1	0.77%
Pricing	1	0.77%
Technical expertise	1	0.77%
Branding	2	1.54%
Competitive pricing	2	1.54%
Hard work	2	1.54%
Knowledge	2	1.54%
Supportive community	2	1.54%
Customer loyalty	3	2.31%
Demand for products and services	3	2.31%
Lack of competition	3	2.31%
Niche product	3	2.31%
Established business	4	3.08%
Experience	4	3.08%
Workforce	4	3.08%
Word of mouth	5	3.85%
Reputation	8	6.15%
Customer Service	9	6.92%
Tourism	10	7.69%
Community support	11	8.46%
Quality product / service	12	9.23%
Location	33	25.38%
Total	127	

Survey Participants: 152
 Question Respondents: 130
 No Response Count: 22
 Response Rate: 86%

Figure 6.:Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Bought an existing business	1	2%
Business expansion	1	2%
Great community	1	2%
Hobby turned into a business	1	2%

Close to family	2	3%
Demand for products and services	2	3%
Born and raised here	3	5%
Market growth	3	5%
Established business	4	7%
Natural resources	5	8%
Already living here	6	10%
Lifestyle	7	11%
Business opportunity	13	21%
Location	14	23%
Total	63	

Survey Participants: 152
Question Respondents: 61
No Response Count: 91
Response Rate: 40%

Figure 7.:Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	22	22%
No	76	78%
Total	98	

Survey Participants: 152
Question Respondents: 98
No Response Count: 54
Response Rate: 64%

Figure 8.: Does this company have another location elsewhere?: If Yes, where?	Count	Percent of Question Respondents
Elsewhere in nation	3	23%
Outside Canada	3	23%
In Province	9	69%
Total	15	

Survey Participants: 152
Question Respondents: 13
No Response Count: 9
Parent Question 'Yes' Respondents: 22
Parent Question Respondents: 98
Response Rate: 59%

Figure 9.: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	1	1%
Elsewhere in nation	5	6%
In Province	81	93%
Total	87	

Survey Participants: 152
 Question Respondents: 87
 No Response Count: 65
 Response Rate: 57%

Figure 9b: Location of company's headquarters: Province	Count	Percent of Question Respondents
AB	2	3.57%
BC	54	96.43%
Total	56	

Survey Participants: 152
 Question Respondents: 56
 No Response Count: 96
 Response Rate: 37%

Figure 9c: Location of company's headquarters: Nation	Count	Percent of Question Respondents
Canada	50	100.00%
Total	50	

Survey Participants: 152
 Question Respondents: 50
 No Response Count: 102
 Response Rate: 33%

Figure 10.: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	4	3%
Emerging	15	10%
Growing	75	50%
Maturing	55	37%
Total	149	

Survey Participants: 152

Question Respondents: 149

No Response Count: 3

Response Rate: 98%

Figure 11.:How long has this facility operated	Count	Percent of Question Respondents
<1 Year	4	3%
1-4 Years	27	18%
5-9 Years	23	16%
10-19 Years	38	26%
>20 Years	56	38%
Total	148	

Survey Participants: 152

Question Respondents: 148

No Response Count: 4

Response Rate: 97%

Figure 12.: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	9	7%
Privately owned	119	93%
Total	128	

Survey Participants: 152
 Question Respondents: 128
 No Response Count: 24
 Response Rate: 84%

Figure 12b: What is this company's legal status?	Count	Percent of Question Respondents
Limited liability partnership (LLP)	9	6%
Non-profit	16	11%
Partnership	19	13%
Sole proprietorship	29	19%
Corporation	72	48%
Other	6	4%
Total	151	

Survey Participants: 152
 Question Respondents: 151
 No Response Count: 1
 Response Rate: 99%

Figure 12c: What is this company's legal status?: If <i>Other</i>, please specify	Count	Percent of Question Respondents
Family Trust	1	1%
Non-profit	1	1%
Sole proprietorship	1	1%
Partnership/Corporation	3	2%
Total	6	

Survey Participants: 152
 Question Respondents: 6
 No Response Count: 0

Parent Question 'Other' 6
 Respondents:
 Parent Question Respondents: 151
 Response Rate: 100%

Figure 13.: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	38	28%
No	97	72%
Total	135	

Survey Participants: 152
 Question Respondents: 135
 No Response Count: 17
 Response Rate: 89%

Figure 13b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Negative	2	5.41%
Neutral	9	24.32%
Positive	26	70.27%
Total	37	

Survey Participants: 152
 Question Respondents: 37
 No Response Count: 1
 Parent Question 'Yes' Respondents: 38
 Parent Question Respondents: 135
 Response Rate: 97%

Figure 13c: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	22	15.07%
No	124	84.93%
Total	146	

Survey Participants: 152
 Question Respondents: 146

No Response Count: 6
 Response Rate: 96%

Figure 14.: If Yes what is the anticipated time frame	Count	Percent of Question Respondents
1 year or less	7	39%
2 years	5	28%
3 years or more	6	33%
Total	18	

Survey Participants: 152
 Question Respondents: 18
 No Response Count: 4
 Parent Question 'Yes' Respondents: 22
 Parent Question Respondents: 146
 Response Rate: 82%

Figure 15.: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Sell/transfer to a family member	2	12%
Sell to another company	4	24%
Sell/transfer to a non-family member	9	53%
Other	2	12%
Total	17	

Survey Participants: 152
 Question Respondents: 17
 No Response Count: 5
 Parent Question 'Yes' Respondents: 22
 Parent Question Respondents: 146
 Response Rate: 77%

Figure 15b: If Yes, how do you intend to exit the business?: If other, please explain	Count	Percent of Question Respondents
Change in board	1	5.88%
Changing to corporation	1	5.88%
Total	2	

Survey Participants:	152
Question Respondents:	2
No Response Count:	0
Parent Question 'Other' Respondents:	2
Parent Question Respondents:	17
Response Rate:	77%

Figure 16.:Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	24	19%
No	87	69%
Not applicable	15	12%
Total	126	

Survey Participants:	152
Question Respondents:	126
No Response Count:	26
Response Rate:	83%

Figure 16b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	18	15%
No	104	85%
Total	122	

Survey Participants:	152
Question Respondents:	122
No Response Count:	30
Response Rate:	80%

Figure 16c: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	14	66.67%
No	6	28.57%
Total	20	

Survey Participants: 152
 Question Respondents: 21
 No Response Count: 3
 Parent Question 'Yes' Respondents: 24
 Parent Question Respondents: 126
 Response Rate: 88%

Figure 16d: If Yes, by whom	Count	Percent of Question Respondents
Accountant	1	12.50%
Business partner	1	12.50%
Lawyer	2	25.00%
Other	3	37.50%
Total	7	

Survey Participants: 152
 Question Respondents: 8
 No Response Count: 6
 Parent Question 'Yes' Respondents: 14
 Parent Question Respondents: 21
 Response Rate: 57%

Figure 16e: If Yes, by whom: If <i>other</i>, please explain	Count	Percent of Question Respondents
Banker	1	12.50%
Board members	1	12.50%
Board of Directors	1	12.50%
Business Partner	1	12.50%
Consultant	1	12.50%
Accountant	4	50.00%
Total	9	

Survey Participants: 152
 Question Respondents: 7
 No Response Count: 0
 Parent Question 'Other' Respondents: 3
 Parent Question Respondents: 8
 Response Rate: 57%

Figure 17.:Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	67	52%
No	62	48%
Total	129	

Survey Participants: 152
 Question Respondents: 129
 No Response Count: 23
 Response Rate: 85%

LOCAL WORKFORCE

Figure 18.: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	57	38%
5-9	31	20%
10-19	21	14%
20-49	22	14%
50-99	14	9%
Over 100	7	5%
Total	152	

Total employees: 4071

Survey Participants: 152
 Question Respondents: 152
 No Response Count: 0
 Response Rate: 100%

Figure 19.: Nature of Employment	Count	Percent of Question Respondents
Full Time	1669	41%
Part Time	1436	35%
Temporary	966	24%
Total	4071	

Survey Participants: 152
 Question Respondents: 152
 Response Rate: 100.00%

Figure 19b: Total number of employees at this facility*: Full-time employees	Count	Percent of Question Respondents
Less than 5	98	64.47%
5-9	21	13.82%
10-19	10	6.58%
20-49	14	9.21%
50-99	5	3.29%
Over 100	4	2.63%
Total	152	

Total full-time employees: 1669

Survey Participants: 152

Question Respondents: 152

No Response Count: 0

Response Rate: 100%

Figure 19c: Total number of employees at this facility*: Part-time employees	Count	Percent of Question Respondents
Less than 5	112	73.68%
5-9	12	7.89%
10-19	13	8.55%
20-49	10	6.58%
50-99	3	1.97%
Over 100	2	1.32%
Total	152	

Total part-time employees: 1436

Survey Participants: 152

Question Respondents: 152

No Response Count: 0

Response Rate: 100%

Figure 19d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	121	79.61%

5-9	12	7.89%
10-19	7	4.61%
20-49	7	4.61%
50-99	4	2.63%

Over 100 1 0.66%

Total 152

Total temporary employees: 966

Survey Participants: 152

Question Respondents: 152

No Response Count: 0

Response Rate: 100%

Figure 20.: Historical employment trend	Count	Percent of Question Respondents
Declining	28	21%
Staying the same	64	48%
Increasing	42	31%
Total	134	

Survey Participants: 152

Question Respondents: 134

No Response Count: 18

Response Rate: 88%

Figure 21.:How did the number of staff change, if at all, in the last 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	31	24%
Stayed the same	84	65%
Decreased	14	11%
Total	129	

Survey Participants: 152

Question Respondents: 129

No Response Count: 23

Response Rate: 85%

Figure 21b: How did the number of staff change, if at all, in the last 3 years?:	Count	Percent of Question Respondents
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Part-time		
Increased	32	28%
Stayed the same	66	57%
Decreased	18	16%
Total	116	

Survey Participants: 152
Question Respondents: 116
No Response Count: 36
Response Rate: 76%

Figure 21c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	20	23%
Stayed the same	55	63%
Decreased	13	15%
Total	88	

Survey Participants: 152
Question Respondents: 88
No Response Count: 64
Response Rate: 58%

Figure 22.:How do you expect the number of staff to change, if at all over the next 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	49	39%
Stayed the same	74	59%
Decreased	3	2%
Total	126	

Survey Participants: 152
Question Respondents: 126
No Response Count: 26
Response Rate: 83%

Figure 22b: How do you expect the number of staff to change, if at all over the next 3 years?:	Count	Percent of Question Respondents

Part-time		
Increased	46	40%
Stayed the same	61	54%
Decreased	7	6%
Total	114	

Survey Participants: 152
 Question Respondents: 114
 No Response Count: 38
 Response Rate: 75%

Figure 22c: How do you expect the number of staff to change, if at all over the next 3 years?: Casual	Count	Percent of Question Respondents
Increased	20	24%
Stayed the same	60	72%
Decreased	3	4%
Total	83	

Survey Participants: 152
 Question Respondents: 83
 No Response Count: 69
 Response Rate: 55%

Figure 23.: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	13	10%
26 - 34	40	31%
35 - 49	54	41%
50 or older	24	18%
Total	131	

Survey Participants: 152
 Question Respondents: 131
 No Response Count: 21
 Response Rate: 86%

Figure 24.: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents

Lower than	13	13%
Same as	48	48%
Greater than	40	40%
Total	101	

Survey Participants: 152
Question Respondents: 101
No Response Count: 51
Response Rate: 66%

Figure 24b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
Under \$10	5	6.25%
\$10-\$12.99	4	5.00%
\$13-\$14.99	6	7.50%
\$15-\$19.99	15	18.75%
\$20-\$29.99	33	41.25%
\$30-49.99	11	13.75%
\$50-\$99	4	5.00%
\$100 or more	2	2.50%
Total	80	

Survey Participants: 152
Question Respondents: 80
No Response Count: 72
Response Rate: 53%

Figure 24c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
Under \$10	3	4.17%
\$10-\$12.99	14	19.44%
\$13-\$14.99	15	20.83%
\$15-\$19.99	27	37.50%
\$20-\$29.99	11	15.28%
\$30-49.99	2	2.78%
Total	72	

Survey Participants: 152
Question Respondents: 72
No Response Count: 80
Response Rate: 47%

Figure 24d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
Under \$10	7	11.11%
\$10-\$12.99	38	60.32%
\$13-\$14.99	8	12.70%
\$15-\$19.99	9	14.29%
\$20-\$29.99	1	1.59%
Total	63	

Survey Participants: 152
 Question Respondents: 63
 No Response Count: 89
 Response Rate: 41%

Figure 25.:Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	89	86%
Decreasing	4	4%
Increasing	11	11%
Total	104	

Survey Participants: 152
 Question Respondents: 104
 No Response Count: 48
 Response Rate: 68%

Figure 26.: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Nationally	4	3%
Internationally	5	4%
Provincially	9	7%
Locally	118	87%
Total	136	

Survey Participants: 152
 Question Respondents: 136
 No Response Count: 16
 Response Rate: 89%

Figure 27.: Recruitment and retention challenges	Count	Percent
Retention challenges	44	33%

Recruitment challenges	54	40%
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Figure 27b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	44	33%
No	89	67%
Total	133	

Survey Participants: 152

Question Respondents: 133

No Response Count: 19

Response Rate: 88%

Figure 27c: Is the company experiencing recruitment problems with any employee positions or skills?	Count	Percent of Question Respondents
Yes	54	40.00%
No	81	60.00%
Total	135	

Survey Participants: 152

Question Respondents: 135

No Response Count: 17

Response Rate: 89%

Figure 28.: If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.	Count	Percent of Question Respondents
Avoid layoffs (find extra work)	1	1.96%
Provide housing	1	1.96%
Find addition work for slow times	2	3.92%
Flex Time	3	5.88%
Support personal growth and skill development	3	5.88%
Training	3	5.88%
Housing	4	7.84%
Staff discounts	4	7.84%
Bonuses	6	11.76%

Benefits	11	21.57%
Support a positive environment	11	21.57%
Fair wages	14	27.45%
None	6	11.76%
Total	69	

Survey Participants: 109
Question Respondents: 51
No Response Count: 58
Response Rate: 47%

Figure 29.:If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
Benefits	1	2%
Cooperative education	1	2%
Employment agencies	1	2%
Flexible work schedule	1	2%
Internet	1	2%
Job Fairs	1	2%
Reached out to Colleges	1	2%
Recruiting Firms	1	2%
WorkBC	1	2%
International recruitment	2	4%
Networking	2	4%
Post openings on company website	2	4%
Social media (Facebook/ LinkedIn)	2	4%
Staff discounts	2	4%
Training	2	4%
Training	2	4%
Online job boards	4	8%
Advertising	12	23%
Word of mouth	12	23%
None	7	13%
Total	56	

Survey Participants: 109
Question Respondents: 52

No Response Count: 57
 Response Rate: 48%

Figure 30.: Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?	Count	Percent of Question Respondents
Assembler/Line Workers	1	2%
CDL Drivers	1	2%
Material/Fabricators	1	2%
Prof/Info Tech/Programming	1	2%
Construction/Contractors	2	4%
Healthcare Professionals	2	4%
Marketing	2	4%
Professional/Technical	2	4%
Electrical/Electronics	3	6%
Graphics Arts/Printing	3	6%
Machine Operators	3	6%
Mechanics	3	6%
Professional/Other	3	6%
Maintenance	5	9%
Sales/Retail	5	9%
General Laborer	7	13%
Sales/Service	7	13%
Administrative/Clerical	9	17%
Food/Beverage Service	17	32%
Hospitality Service	19	36%
Other	29	55%
Total	125	

Survey Participants: 152
 Question Respondents: 53
 No Response Count: 1
 Parent Question 'Yes' Respondents: 54
 Parent Question Respondents: 135
 Response Rate: 98%

Figure 30b: Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)	Count	Percent of Question Respondents
Commercial drivers	1	1.89%
Fitness instructors	1	1.89%
Groundskeepers	1	1.89%
Guiding trip leaders	1	1.89%
Gymnastics Coaches	1	1.89%
Labourers	1	1.89%
Machine operators	1	1.89%
Marketing	1	1.89%
Recreation	1	1.89%
Students	1	1.89%
Yoga Instructors	1	1.89%
Managers	2	3.77%
Sales	2	3.77%
Skilled trades	2	3.77%
Chef / Bakers / Butchers	4	7.55%
Housekeeping	5	9.43%
Total	26	

Survey Participants: 152

Question Respondents: 27

No Response Count: 2

Parent Question 'Other' Respondents: 29

Figure 31.: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	54	40.60%
No	79	59.40%
Total	133	

Survey Participants: 152

Question Respondents: 133

No Response Count: 19

Response Rate:

88%

Figure 31b: Do you anticipate future recruiting difficulties i.e. 3-5 year?: If Yes, in what area(s)?	Count	Percent of Question Respondents
Assembler/Line Workers	1	2%
CDL Drivers	1	2%
Construction/Contractors	1	2%
Material/Fabricators	1	2%
Prof/Info Tech/Programming	1	2%
Professional/Technical	1	2%
Healthcare Professionals	2	4%
Electrical/Electronics	3	6%
Graphics Arts/Printing	3	6%
Machine Operators	3	6%
Marketing	3	6%
Professional/Other	3	6%
Sales/Retail	4	8%
Maintenance	5	10%
Mechanics	5	10%
Sales/Service	5	10%
General Laborer	7	14%
Administrative/Clerical	11	22%
Food/Beverage Service	16	31%
Hospitality Service	16	31%
Other	29	57%
Total	121	

Survey Participants: 152
 Question Respondents: 51
 No Response Count: 3
 Parent Question 'Yes' Respondents: 54
 Parent Question Respondents: 133
 Response Rate: 94%

Figure 31c: Do you anticipate future recruiting difficulties i.e.	Count	Percent of Question Respondents
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3-5 year? : Other (specify job roles/titles)		
Bakers	1	1.96%
Guides	1	1.96%
Gymnastics Coaches	1	1.96%
Heavy Equipment Operators	1	1.96%
Kitchen staff	1	1.96%
River guides	1	1.96%
Service staff	1	1.96%
Skilled professional	1	1.96%
Teachers	1	1.96%
Accountants	2	3.92%
Bookkeepers	2	3.92%
Commercial Truck Drivers	2	3.92%
Skilled/Professional	2	3.92%
Managers	4	7.84%
Housekeeping	5	9.80%
Total	26	

Survey Participants: 152

Question Respondents: 27

No Response Count: 2

Parent Question 'Other' Respondents: 29

Figure 32.: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	23	40%
No	35	60%
Total	58	

Survey Participants: 152

Question Respondents: 58

No Response Count: 94

Response Rate: 38%

Figure 32b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes,	Count	Percent of Question Respondents

please explain		
Better airport	1	4.55%
Encourage leadership and funding	1	4.55%
Establish a job bank	1	4.55%
Improve visitor and business information centres	1	4.55%
Streamline process to hire temporary foreign workers	1	4.55%
Support staff and short term employment during shoulder seasons	1	4.55%
Provide training and education	2	9.09%
Subsidize wages	2	9.09%
Help with foreign worker program	3	13.64%
Support affordable housing	3	13.64%
Better job advertising	4	18.18%

Total 20

Survey Participants: 152
 Question Respondents: 22
 No Response Count: 1
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 58
 Response Rate: 96%

Figure 33.: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	46	42%
Semi-skilled	24	22%
Entry-level	19	17%
Total	89	

Figure 33b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
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less than 25%	25	22.94%
25 to 49%	25	22.94%
50 to 74%	18	16.51%
75 to 100%	41	37.61%
Total	109	

Survey Participants: 152
 Question Respondents: 109
 No Response Count: 43
 Response Rate: 72%

Figure 33c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	25	28.74%
25 to 49%	24	27.59%
50 to 74%	26	29.89%
75 to 100%	12	13.79%
Total	87	

Survey Participants: 152
 Question Respondents: 87
 No Response Count: 65
 Response Rate: 57%

Figure 33d: Percent of workforce: Entry-level	Count	Percent of Question Respondents
less than 25%	28	40.00%
25 to 49%	14	20.00%
50 to 74%	17	24.29%
75 to 100%	11	15.71%
Total	70	

Survey Participants: 152
 Question Respondents: 70
 No Response Count: 82
 Response Rate: 46%

Figure 34.: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	62	50%
No	63	50%

Total	125	
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Survey Participants: 152
 Question Respondents: 125
 No Response Count: 27
 Response Rate: 82%

Figure 34b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	52	83%
No	11	17%
Total	63	

Survey Participants: 152
 Question Respondents: 63
 No Response Count: 89
 Response Rate: 41%

Figure 34c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	24	39%
No	37	61%
Total	61	

Survey Participants: 152
 Question Respondents: 61
 No Response Count: 91
 Response Rate: 40%

Figure 35.: Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?	Count	Percent of Question Respondents
Yes	48	38%
No	79	62%
Total	127	

Survey Participants: 152
 Question Respondents: 127
 No Response Count: 25

Response Rate: 84%

Figure 36.:Are there any areas of training or professional development that would be of benefit to you or your employees?	Count	Percent of Question Respondents
Yes	97	74.05%
No	34	25.95%
Total	131	

Survey Participants: 152
 Question Respondents: 131
 No Response Count: 21
 Response Rate: 86%

Figure 37.:Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they?	Count	Percent of Question Respondents
Bartending	1	1%
Bookkeeping	1	1%
Conflict Resolution	1	1%
Continued education	1	1%
Emerging technologies	1	1%
Franchise Training	1	1%
Hospitality training	1	1%
Professional development	1	1%
Theatre Technical Skills	1	1%
WHMIS	1	1%
Workshops -- Local	1	1%
Business management	2	2%
Communications	2	2%
Cooking skills	2	2%
Social media	2	2%
Technical training	3	3%
Industrial equipment operations	5	5%

Managerial training	5	5%
Web site design	5	5%
Computer skills	9	9%
Emerging industry practices	9	9%
Accounting/Bookkeeping	11	12%
Business Management	11	12%
Sales/Marketing	11	12%
Customer service	13	14%
Safety/First Aid/Food Safe	26	27%
Total	127	

Survey Participants: 152
 Question Respondents: 95
 No Response Count: 2
 Parent Question 'Yes' Respondents: 97
 Parent Question Respondents: 131
 Response Rate: 98%

Figure 38.: What modes of education/training work best for you?	Count	Percent of Question Respondents
Online/ Webinar training	45	39%
Individual coaching	56	49%
Classroom	66	58%
Other	19	17%
Total	186	

Survey Participants: 152
 Question Respondents: 114
 No Response Count: 38
 Response Rate: 75%

Figure 38b: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Mentor	1	0.88%
National Coaching Programs	1	0.88%
Online/ Webinar training	1	0.88%

Technical training sessions	1	0.88%
Trade shows / Conferences	3	2.63%
In-house / Hands on / Workshop	11	9.65%
Total	18	

Survey Participants: 152
 Question Respondents: 18
 No Response Count: 1
 Parent Question 'Other' Respondents: 19
 Parent Question Respondents: 114
 Response Rate: 95%

Figure 39.: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	5	5%
Rest of Canada	13	12%
Regional	23	22%
British Columbia	33	31%
Local	71	66%
Total	145	

Survey Participants: 152
 Question Respondents: 107
 No Response Count: 45
 Response Rate: 70%

Union status	Count	Percent of Question Respondents
Yes	7	5.43%
No	100	77.52%
Not applicable	22	17.05%
Total	129	

Survey Participants: 152
 Question Respondents: 129
 No Response Count: 23

Response Rate: 85%

Figure 40.: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Child care	27	35%
Transportation	33	43%
Housing	41	53%
Cost of living	55	71%
Other	20	26%
Total	176	

Survey Participants: 109
 Question Respondents: 77
 No Response Count: 32
 Response Rate: 71%

Figure 40b: Please indicate which issues you believe are critical to your employees?: If Other, please list any other issues	Count	Percent of Question Respondents
Benefits	1	1.30%
Flextime	1	1.30%
Getting enough work hours	1	1.30%
Healthy Work environment	1	1.30%
Training	1	1.30%
Transportation	1	1.30%
Seasonality of work	2	2.60%
Affordable housing	4	5.19%
Wages	7	9.09%
Total	19	

Survey Participants: 109
 Question Respondents: 21
 No Response Count: 0
 Parent Question 'Other' Respondents: 20
 Parent Question Respondents: 77

Response Rate: 100%

In general terms, what percent of your workforce lives in the: Community (%)	Count	Percent of Question Respondents
25-49%	2	2.41%
50-74%	2	2.41%
75-100%	79	95.18%
Total	83	

Survey Participants: 109

Question Respondents: 83

No Response Count: 26

Response Rate: 76%

In general terms, what percent of your workforce lives in the: Region (%) - includes entire Columbia Basin-Boundary region	Count	Percent of Question Respondents
0-24%	14	70.00%
25-49%	3	15.00%
75-100%	3	15.00%
Total	20	

Survey Participants: 109

Question Respondents: 20

No Response Count: 89

Response Rate: 18%

In general terms, what percent of your workforce lives in the: Outside of region (%)	Count	Percent of Question Respondents
0-24%	7	63.64%
25-49%	1	9.09%
50-74%	2	18.18%
75-100%	1	9.09%
Total	11	

Survey Participants: 109

Question Respondents: 11

No Response Count: 98

Response Rate: 10%

SALES

Figure 41.: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	5	6%
\$49,999 to \$25,000	5	6%
\$99,999 to \$50,000	6	7%
499,999 to \$100,000	31	35%
\$999,999 to \$500,000	12	13%
\$4.9 million to 1 million	26	29%
\$9.9 million to 5 million	3	3%
\$50 million to 20 million	1	1%
Total	89	
Survey Participants:	152	

Question Respondents: 89

No Response Count: 63

Response Rate: 59%

Figure 42.: Is the market for your product	Count	Percent of Question Respondents
Stable	62	53%
Decreasing	10	9%
Increasing	44	38%
Total	116	

Survey Participants: 152

Question Respondents: 116

No Response Count: 36

Response Rate: 76%

Figure 43.: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents

Stable	62	53%
Decreasing	10	9%
Increasing	44	38%
Total	116	

Survey Participants: 152
Question Respondents: 116
No Response Count: 36
Response Rate: 76%

Figure 44.: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	3	2%
0%	14	10%
1 - 9%	54	40%
10 - 24%	41	30%
25 - 49%	14	10%
50 - 99%	7	5%
Over 100%	3	2%
Total	136	

Survey Participants: 152
Question Respondents: 136
No Response Count: 16
Response Rate: 89%

Figure 45.: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	23	17%
Staying the same	23	17%
Increasing	82	62%
Not applicable	5	4%
Total	133	

Survey Participants: 152
Question Respondents: 133
No Response Count: 19
Response Rate: 88%

Figure 45b: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Declining	1	1%
Staying the same	4	4%
Increasing	12	13%
Not applicable	77	82%
Total	94	

Survey Participants: 152
 Question Respondents: 94
 No Response Count: 58
 Response Rate: 62%

Figure 45c:: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	29	24%
Staying the same	27	22%
Increasing	56	46%
Not applicable	10	8%
Total	122	

Survey Participants: 152
 Question Respondents: 122
 No Response Count: 30
 Response Rate: 80%

Figure 46.: Historical export sales trend	Count	Percent of Question Respondents
Declining	4	4%
Staying the same	2	2%
Increasing	2	2%
Not applicable	98	92%
Total	106	

Survey Participants: 152
 Question Respondents: 106
 No Response Count: 46
 Response Rate: 70%

Figure 47.:Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
1 - 9%	13	59%
10 - 25%	3	14%
26 - 50%	4	18%
51 - 75%	1	5%
76 - 100%	1	5%
Total	22	

Survey Participants: 109
 Question Respondents: 22
 No Response Count: 87
 Response Rate: 20%

Figure 48.: Source of Majority of Sales	Count	Percent of Question Respondents
Local	50	43%
Provincial	8	7%
National	24	21%
United States	2	2%
International	4	3%
Total	88	

Figure 48b: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents
0%	12	13.33%
1-9%	25	27.78%
10-19%	19	21.11%
20-29%	13	14.44%
30-39%	8	8.89%

40-49%	7	7.78%
50-59%	2	2.22%
60-69%	2	2.22%
70-79%	1	1.11%
90-99%	1	1.11%
Total	90	

Survey Participants: 152
Question Respondents: 90
No Response Count: 62
Response Rate: 59%

Figure 48c: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
0%	7	8.05%
1-9%	29	33.33%
10-19%	26	29.89%
20-29%	14	16.09%
30-39%	7	8.05%
50-59%	2	2.30%
60-69%	1	1.15%
70-79%	1	1.15%
Total	87	

Survey Participants: 152
Question Respondents: 87
No Response Count: 65
Response Rate: 57%

Figure 48d: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
0%	7	6.60%
1-9%	12	11.32%
10-19%	16	15.09%
20-29%	19	17.92%
30-39%	13	12.26%
40-49%	10	9.43%
50-59%	9	8.49%

60-69%	10	9.43%
70-79%	6	5.66%
80-89%	3	2.83%
90-99%	1	0.94%
Total	106	

Survey Participants: 152
Question Respondents: 106
No Response Count: 46
Response Rate: 70%

Figure 48e: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
0%	5	4.50%
1-9%	16	14.41%
10-19%	34	30.63%
20-29%	20	18.02%
30-39%	14	12.61%
40-49%	7	6.31%
50-59%	8	7.21%
70-79%	4	3.60%
80-89%	1	0.90%
90-99%	2	1.80%
Total	111	

Survey Participants: 152
Question Respondents: 111
No Response Count: 41
Response Rate: 73%

Figure 48f: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
0%	4	3.48%
1-9%	15	13.04%
10-19%	15	13.04%
20-29%	12	10.43%
30-39%	7	6.09%
50-59%	12	10.43%

60-69%	5	4.35%
70-79%	7	6.09%
80-89%	9	7.83%
90-99%	8	6.96%
100%	21	18.26%
Total	115	

Survey Participants: 152
 Question Respondents: 115
 No Response Count: 37
 Response Rate: 76%

Figure 49.: International trade status	Count	Percent of Question Respondents
Export	2	2%
Import	8	7%
None	20	16%
Not applicable	94	76%
Total	124	

Survey Participants: 152
 Question Respondents: 123
 No Response Count: 29
 Response Rate: 81%

Figure 50.: Do you engage in government procurement?	Count	Percent of Question Respondents
Yes	15	29%
No	37	71%
Total	52	

Survey Participants: 109
 Question Respondents: 52
 No Response Count: 57
 Response Rate: 48%

Figure 51.:Source of Majority of Supplies	Count	Percent of Question Respondents
Local	44	44%
Provincial	22	22%
National	23	23%
United States	4	4%
International	7	7%
Total	100	

Figure 51b: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
0%	2	2.02%
1-9%	4	4.04%
10-19%	13	13.13%
20-29%	12	12.12%
30-39%	4	4.04%
40-49%	8	8.08%
50-59%	12	12.12%
60-69%	2	2.02%
70-79%	5	5.05%
80-89%	10	10.10%
90-99%	11	11.11%
100%	16	16.16%
Total	99	

Survey Participants: 152
 Question Respondents: 99
 No Response Count: 53
 Response Rate: 65%

Figure 51c: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
0%	4	5.13%
1-9%	7	8.97%

10-19%	10	12.82%
20-29%	10	12.82%
30-39%	8	10.26%
40-49%	6	7.69%
50-59%	11	14.10%
60-69%	3	3.85%
70-79%	4	5.13%
80-89%	7	8.97%
90-99%	4	5.13%
100%	4	5.13%
Total	78	

Survey Participants: 152
Question Respondents: 78
No Response Count: 74
Response Rate: 51%

Figure 51d: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
0%	9	10.98%
1-9%	7	8.54%
10-19%	12	14.63%
20-29%	14	17.07%
30-39%	5	6.10%
40-49%	2	2.44%
50-59%	10	12.20%
60-69%	4	4.88%
70-79%	7	8.54%
80-89%	2	2.44%
90-99%	4	4.88%
100%	6	7.32%
Total	82	

Survey Participants: 152
Question Respondents: 82
No Response Count: 70
Response Rate: 54%

Figure 51e: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
0%	10	18.87%
1-9%	8	15.09%
10-19%	16	30.19%
20-29%	4	7.55%
30-39%	2	3.77%
40-49%	3	5.66%
50-59%	6	11.32%
90-99%	1	1.89%
100%	3	5.66%
Total	53	

Survey Participants: 152
 Question Respondents: 53
 No Response Count: 99
 Response Rate: 35%

Figure 51f: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
0%	16	45.71%
1-9%	7	20.00%
10-19%	4	11.43%
40-49%	1	2.86%
70-79%	3	8.57%
80-89%	1	2.86%
90-99%	1	2.86%
100%	2	5.71%
Total	35	

Survey Participants: 152
 Question Respondents: 35
 No Response Count: 117
 Response Rate: 23%

Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	27	48%
No	29	52%
Total	56	

Survey Participants: 152
 Question Respondents: 56
 No Response Count: 96
 Response Rate: 37%

What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?	Count	Percent of Question Respondents
Alarm testing	1	2.17%
Automotive parts & equipment	1	2.17%
Building maintenance services	1	2.17%
Chemicals	1	2.17%
Cleaning Products	1	2.17%
Computers / Software	1	2.17%
Confection suppliers	1	2.17%
Electronics	1	2.17%
Farming Supplies	1	2.17%
Film	1	2.17%
Furniture	1	2.17%
Giftware	1	2.17%
Heavy equipment/parts	1	2.17%
House hold items	1	2.17%
Laundry services	1	2.17%
Office furniture	1	2.17%
Printing services	1	2.17%
Produce	1	2.17%
Recreational equipment	1	2.17%
Shipping Services	1	2.17%
Tour services	1	2.17%
Travel service	1	2.17%

Wholesale services	1	2.17%
Art supplies	2	4.35%
Office supplies	2	4.35%
Bedding / Linens	4	8.70%
Meats & Dairy / Fruits and Vegetables / Grains	6	13.04%
None	1	2.17%
Total	38	

Survey Participants: 109
 Question Respondents: 46
 No Response Count: 63
 Response Rate: 42%

Figure 52.: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?	Count	Percent of Question Respondents
Long term contract with outside supplier	1	1%
Loyalty to current supplier	3	4%
No control - head office decision	3	4%
Unaware of local vendors	4	6%
Quality of available products	6	9%
No applicable to this business	8	11%
Higher costs locally	24	34%
Product not available here	59	84%
Other	2	3%
Total	110	

Survey Participants: 109
 Question Respondents: 70
 No Response Count: 39
 Response Rate: 64%

Figure 52b: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If <i>Other</i>, specify	Count	Percent of Question Respondents
Franchise restrictions	1	1.43%
Total	1	

Survey Participants: 109

Question Respondents: 2

No Response Count: 0

Parent Question 'Other' Respondents: 2

Parent Question Respondents: 70

Response Rate: 100%

FACILITIES AND EQUIPMENT

Figure 53.:What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents
less than 1,000 sq ft	21	20%
1,000-4,999 sq ft	33	31%
5,000-9,999 sq ft	21	20%
10,000-19,999 sq ft	10	9%
20,000 sq ft or more	21	20%
Total	106	

Survey Participants: 152

Question Respondents: 106

No Response Count: 46

Response Rate: 70%

Figure 54.: Condition of facility	Count	Percent of Question Respondents
Excellent	51	39%
Good	59	45%
Fair	21	16%
Total	131	

Survey Participants: 152
Question Respondents: 131
No Response Count: 21
Response Rate: 86%

Figure 55.: Condition of equipment	Count	Percent of Question Respondents
Excellent	52	39%
Good	69	51%
Fair	14	10%
Total	135	

Survey Participants: 152
Question Respondents: 135
No Response Count: 17
Response Rate: 89%

Figure 56.: Status of facility	Count	Percent of Question Respondents
Leased	43	31%
Owned	98	70%
Total	141	

Survey Participants: 152

Question
 Respondents: 141
 No Response Count: 11
 Response Rate: 93%

Figure 57.: Status of facility: If <i>Leased</i>, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	14	44%
1-2 Years	4	13%
3-5 Years	4	13%
>5 Years	10	31%
Total	32	

Survey Participants: 152
 Question
 Respondents: 32
 No Response Count: 11
 Parent Question
 'Leased' Respondents: 43
 Parent Question
 Respondents: 141
 Response Rate: 74%

Figure 57b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	29	70.73%
No	9	21.95%
Total	38	

Survey Participants: 152
 Question
 Respondents: 41
 No Response Count: 2
 Parent Question
 'Leased' Respondents: 43
 Parent Question
 Respondents: 141

Response Rate: 95%

Figure 58.: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	11	24%
Own	35	76%
Total	46	

Survey Participants: 152
Question Respondents: 46
No Response Count: 106
Response Rate: 30%

Figure 59.: Historical investment trends: Over past 18 months in the <i>facility</i>	Count	Percent of Question Respondents
Declining	8	7%
Staying the same	59	51%
Increasing	48	42%
Total	115	

Survey Participants: 152
Question Respondents: 115
No Response Count: 37
Response Rate: 76%

Figure 60.: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	78	62%
No	38	30%
Maybe	10	8%
Total	126	

Survey Participants: 152
 Question Respondents: 126
 No Response Count: 26
 Response Rate: 83%

Figure 61.: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	69	49%
No	72	51%
Total	141	

Survey Participants: 152
 Question Respondents: 141
 No Response Count: 11
 Response Rate: 93%

Figure 61b: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	41	32.54%
No	85	67.46%
Total	126	

Survey Participants: 152
 Question Respondents: 126
 No Response Count: 26
 Response Rate: 83%

Figure 62.: Does the company plan to expand in the next three years?: Is your current site adequate for the proposed expansion?	Count	Percent of Question Respondents
Yes	45	65%
No	21	30%

Total	66	
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Survey Participants: 152
Question Respondents: 69

No Response Count: 0

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 100%

Figure 63.: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents
Yes	61	85%
No	6	8%
Total	67	

Survey Participants: 152
Question Respondents: 72

No Response Count: 0

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 100%

Figure 64.: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	5	13%
\$25,000-\$99,999	6	15%
\$100,000-\$499,999	9	23%
\$500,000-\$999,999	4	10%
\$1-\$4.9 million	11	28%
\$5-\$9.9 million	1	3%

\$10-19.9 million	2	5%
\$20 million and over	1	3%

Total 39

Survey Participants: 152

Question Respondents: 39

No Response Count: 30

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 57%

Figure 65.: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
0%	1	3%
Under 50%	14	37%
50 to 99%	10	26%
100%	13	34%
Total	38	

Survey Participants: 152

Question Respondents: 38

No Response Count: 31

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 55%

Figure 66.: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents

0%	4	14%
Under 50%	8	28%
50 to 99%	12	41%
100%	5	17%
Total	29	

Survey Participants: 152

Question Respondents: 29

No Response Count: 40

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 42%

Figure 67.: Does the company plan to expand in the next three years?: Estimated facility size increase (square feet)	Count	Percent of Question Respondents
Less than 1,000 sq ft	10	31%
1,000 to 4,999 sq ft	14	44%
5,000-9,999 sq ft	4	13%
10,000-19,999 sq ft	1	3%
20,000 sq ft or more	3	9%
Total	32	

Survey Participants: 152

Question Respondents: 32

No Response Count: 37

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 46%

Figure 68.: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	43	73%
No	16	27%
Total	59	

Survey Participants: 152
 Question Respondents: 59
 No Response Count: 93
 Response Rate: 39%

Figure 68b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	8	19.05%
6	7	16.67%
12	13	30.95%
18	4	9.52%
24	2	4.76%
36	8	19.05%
Total	42	

Survey Participants: 152
 Question Respondents: 42
 No Response Count: 1
 Parent Question 'Yes' Respondents: 43
 Parent Question Respondents: 59
 Response Rate: 98%

Figure 69.: Planning any upgrades to the facility?	Count	Percent of Question Respondents
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Yes	39	68%
No	18	32%
Total	57	

Survey Participants: 152
Question Respondents: 57
No Response Count: 95
Response Rate: 38%

Figure 69b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	10	25.64%
6	10	25.64%
12	9	23.08%
18	1	2.56%
24	7	17.95%
36	2	5.13%
Total	39	

Survey Participants: 152
Question Respondents: 39
No Response Count: 0
Parent Question 'Yes' Respondents: 39
Parent Question Respondents: 57
Response Rate: 100%

Figure 70.: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Building code restrictions	1	11%
Business capacity	1	11%
Change in ownership	1	11%
Lease issues	1	11%

Ownership	1	11%
Financing	3	33%
None	2	22%
Total	10	

Survey Participants: 152
 Question Respondents: 9
 No Response Count: 9
 Parent Question 'No' Respondents: 18
 Response Rate: 50%

Figure 71.: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Warehousing	1	1%
Transport/freight	3	4%
Energy reliability	7	10%
Identifying and accessing new markets	7	10%
Lack of skilled staff	8	11%
Roads	8	11%
Broadband access	11	15%
Energy costs	11	15%
Problems with Development Approvals	12	16%
Lack of suitable premises	13	18%
Other (please specify):	17	23%
Local regulations e.g. zoning	23	32%
Finance	26	36%
Total	147	

Survey Participants: 152

Question Respondents: 73

No Response Count: 0

Parent Question 'Yes' Respondents: 69

Parent Question Respondents: 141

Response Rate: 100%

Figure 71b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
Demand for service / product	1	4.76%
Financing	1	4.76%
Government	1	4.76%
Lack of suitable airport	1	4.76%
Language	1	4.76%
Skilled labour supply	1	4.76%
Snow	1	4.76%
Taxes	1	4.76%
Communications infrastructure	2	9.52%
Expansion costs	2	9.52%
Lack of Suitable Premises	2	9.52%
Time	2	9.52%
Local Regulations	3	14.29%
Total	19	

Survey Participants: 152

Question Respondents: 21

No Response Count: 0

Parent Question 'Other (please specify):' Respondents: 21

Parent Question Respondents: 73

Response Rate: 100%

Figure 72.: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	32	48.48%
No	34	51.52%
Total	66	

Survey Participants: 152
 Question Respondents: 66
 No Response Count: 86
 Response Rate: 43%

Figure 72b: If Yes, which have you approached?	Count	Percent of Question Respondents
BC Hydro	2	8%
Chamber of Commerce	2	8%
Community Futures	2	8%
Local Economic Development Office	7	27%
BC Ministry responsible for Economic Development	8	31%
Local Council	10	38%
Other (please specify):	16	62%
Total	47	

Survey Participants: 152
 Question Respondents: 26
 No Response Count: 6

Parent Question 'Yes' 32
 Respondents:
 Parent Question 66
 Respondents:
 Response Rate: 81%

Figure 72c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
BBA (Basin Business Advisors)	1	3.85%
BC Transportation	1	3.85%
CBT	1	3.85%
Canadian Heritage	1	3.85%
City Planners	1	3.85%
Front Counter BC	1	3.85%
Industry Canada	1	3.85%
Ktunaxa Nation	1	3.85%
Liquor Control and Licensing Branch - Ministry of Justice	1	3.85%
Ministry of Transportation	1	3.85%
Nav Canada	1	3.85%
RDCK (Regional District of Central Kootenay)	1	3.85%
Provincial Government	4	15.38%
Total	16	

Survey Participants: 152
Question Respondents: 15
No Response Count: 1

Parent Question
'Other' Respondents: 16
Parent Question
Respondents: 26
Response Rate: 94%

Figure 73.: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	23	64%
No	13	36%
Total	36	

Survey Participants: 109
 Question Respondents: 36
 No Response Count: 73
 Response Rate: 33%

Figure 74.: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	92	71%
No	38	29%
Total	130	

Survey Participants: 152
 Question Respondents: 130
 No Response Count: 22
 Response Rate: 86%

GOVERNMENT SERVICES

Figure 75.: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	55	92%	3	5%	1	2%	0	0%	1	2%	60
Access to US Border	12	19%	8	13%	6	10%	29	46%	8	13%	63
Access to airport facilities	17	12%	45	32%	38	27%	28	20%	12	9%	140
Access to highway/ roads	1	1%	13	9%	26	17%	72	48%	37	25%	149
Access to markets	8	6%	9	6%	49	34%	56	39%	21	15%	143
Access to suppliers	10	7%	19	13%	49	33%	57	39%	12	8%	147
Availability of appropriately zoned land	66	53%	17	14%	12	10%	25	20%	4	3%	124
Availability of buildings for lease or purchase	68	54%	20	16%	15	12%	20	16%	4	3%	127
Availability of rail transport	95	75%	18	14%	4	3%	6	5%	4	3%	127
Availability of road transport services	13	9%	22	15%	49	34%	51	36%	8	6%	143
Availability of warehousing	96	74%	9	7%	13	10%	9	7%	3	2%	130

Development approval process	48	36%	24	18%	24	18%	33	25%	3	2%	132
Disposal of waste material	24	18%	14	10%	24	18%	62	45%	13	9%	137
Inspections /licensing	22	16%	9	6%	32	23%	71	50%	7	5%	141
Recycling	13	9%	19	13%	38	26%	57	39%	19	13%	146
Telecommunications (internet, cell)	2	1%	37	26%	41	28%	55	38%	10	7%	145
Water and sewerage supply	31	22%	10	7%	21	15%	62	44%	16	11%	140

Survey Participants:

152

152

Figure 75b: Please rate the following: Other (please specify)	Please rate the following: Other (please specify)	Count	Percent of Question Respondents
Access to grants and funds	Poor	1	2.56%
Availability of Parking	Poor	1	2.56%
BCSA	Poor	1	2.56%
Cell Service	Poor	3	7.69%
Emergency Services	Poor	1	2.56%
Federal- Employment and Migration	Poor	1	2.56%
Ferry Service	Poor	4	10.26%
Front Counter BC	Poor	1	2.56%
Highway Services	Poor	2	5.13%
Hospital services	Fair	1	2.56%
Liquor control Board	Poor	1	2.56%
Maintenance of landscaping	Poor	1	2.56%
Power outages	Poor	1	2.56%
Regional director	Excellent	1	2.56%
Resort Development Branch-Provincial Government	Good	1	2.56%

Signage regulations	Poor	1	2.56%
Snow Removal	Excellent	1	2.56%
	Fair	1	2.56%
	Good	4	10.26%
	Not applicable	2	5.13%
	Poor	2	5.13%
Tourism BC	Poor	1	2.56%
Transit (local)	Poor	1	2.56%
Work BC	Good	1	2.56%
Total		35	89.74%

Survey Participants: 152

Question Respondents: 39

No Response Count: 113

Response Rate: 26%

Figure 76.: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	95	70.37%
No	40	29.63%
Total	135	

Survey Participants: 152
 Question Respondents: 135
 No Response Count: 17
 Response Rate: 89%

Figure 76b: Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If Yes, how?	Count	Percent of Question Respondents
Assist the development process	1	1.05%
Bring down cost of commercial buildings	1	1.05%
Expand high speed internet services	1	1.05%
Fire station	1	1.05%
Improve sewage and waste water management	1	1.05%
Land zoning	1	1.05%
Snow removal	1	1.05%
Streamline granting of permits	1	1.05%
Access to information	2	2.11%
Improve Border services	2	2.11%
Increase attention to community and business needs	2	2.11%
Provide emergency services	2	2.11%
Provide reliable electric power	2	2.11%
Restructure taxes	2	2.11%
Address land zoning issues	4	4.21%
Consider more and proper signage	4	4.21%
Improve shipping and receiving	4	4.21%
Improve ferry service	5	5.26%
Increase public transportation	5	5.26%
More support for tourism	6	6.32%
Streamline development approval processes	6	6.32%
Improve recycling and waste management	14	14.74%

Improve Airport service	15	15.79%
Improve highway and road quality and service	15	15.79%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	26	27.37%
Total	124	

Survey Participants:	152
Question Respondents:	95
No Response Count:	0
Parent Question 'Yes' Respondents:	95
Parent Question Respondents:	135
Response Rate:	100%

Figure 77.: Which airport services do you use?	Count	Percent of Question Respondents
Bellingham	1	2%
Creston	1	2%
Nelson	1	2%
Revelstoke	1	2%
Seattle	1	2%
Springbank	1	2%
Vancouver	3	5%
Kalispell	4	7%
Trail	6	11%
Spokane	8	14%
Castlegar	10	18%
Cranbrook	12	21%
Calgary	22	39%
Kelowna	23	41%
None	5	9%
Total	99	

Survey Participants: 152
 Question Respondents: 56
 No Response Count: 96
 Response Rate: 37%

Figure 78.: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Charter service	1	2%
Commercial flights	1	2%
Courier service	1	2%
Hanger facilities	1	2%
Local flights to Calgary and Vancouver	1	2%
Lower fares	1	2%
Medivac	1	2%
More Airlines	1	2%
More destinations	1	2%
Parking	1	2%
Scheduled flights	1	2%
Shuttle service	1	2%
Tourism services	1	2%
Tourist information center	1	2%
Extended runway	2	4%
Passenger service	2	4%
Larger aircraft	3	7%
Regular flights	3	7%
Commuter flights	4	9%
Improvements to navigational aids	4	9%
More flights	4	9%
Better flight reliability	5	11%
Total	41	

Survey Participants: 152
 Question Respondents: 45
 No Response Count: 107
 Response Rate: 30%

BUSINESS CLIMATE

Figure 79.: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	4	3%
Good	64	46%
Fair	52	37%
Poor	20	14%
Total	140	

Survey Participants: 152
 Question Respondents: 140
 No Response Count: 12
 Response Rate: 92%

Figure 80.: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
BIA	26	79%	2	6%	2	6%	2	6%	1	3%	33
Chamber of Commerce	2	3%	6	10%	12	19%	27	43%	16	25%	63
Colleges/Universities	34	25%	13	9%	33	24%	49	36%	8	6%	137
Community Futures	20	31%	5	8%	6	9%	25	39%	8	13%	64
Cultural/Recreational Amenities	2	1%	12	9%	35	25%	64	46%	25	18%	138
Economic Development	16	12%	34	25%	49	36%	33	24%	5	4%	137
Housing	10	7%	32	23%	57	41%	37	27%	3	2%	139
K-12 education	29	21%	11	8%	15	11%	62	46%	19	14%	136
Local Government	11	8%	24	18%	36	27%	57	42%	7	5%	135
Local Tax Structure	27	20%	31	23%	47	35%	27	20%	4	3%	136
Technical Training	38	29%	21	16%	38	29%	28	22%	4	3%	129
Tourism services	1	2%	8	12%	11	17%	33	51%	12	18%	65
Workforce Availability	5	4%	33	24%	46	33%	44	32%	10	7%	138

Workforce Quality	5	4%	7	5%	57	42%	53	39%	15	11%	137
Workforce Stability	5	4%	37	27%	54	39%	36	26%	7	5%	139

Survey Participants: 152

Figure 81.: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	56	41%
No change	32	24%
Worse today	33	24%
No opinion	15	11%
Total	136	

Survey Participants: 152
 Question Respondents: 136
 No Response Count: 16
 Response Rate: 89%

Figure 81b: Please compare the local business climate today versus 5 years ago: If worse today, why?	Count	Percent of Question Respondents
Decline of resource industries	1	3.12%
Declining employment	1	3.12%
Disposable income is down	1	3.12%
Expensive commercial real estate	1	3.12%
Lack of affordable accommodation	1	3.12%
Mine closure	1	3.12%
Online shopping	1	3.12%
Cost of doing business	2	6.25%
Locals shopping elsewhere	2	6.25%
Population (low/aging/declining)	2	6.25%
Recession	2	6.25%
Strong Canadian dollar	2	6.25%
Forestry downturn	3	9.38%
Less tourists	3	9.38%
Business failures	4	12.50%
Declining economy	9	28.12%

Total	36	
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Survey Participants:	152
Question Respondents:	32
No Response Count:	1
Parent Question	
'Worse today'	33
Respondents:	
Parent Question	
Respondents:	136
Response Rate:	97%

Figure 82.: Do you have any forecast for the condition of the local business climate 5 years from today?	Count	Percent of Question Respondents
Will be better	102	74%
No change	17	12%
Will be worse	8	6%
No opinion	10	7%
Total	137	

Survey Participants:	152
Question Respondents:	137
No Response Count:	15
Response Rate:	90%

Figure 83.: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Collaboration among businesses	1	1%
Creative business owners	1	1%
Good demographics	1	1%
Good restaurants	1	1%
Low crime	1	1%
Natural attractions	1	1%
Natural beauty	1	1%
Proximity to US	1	1%
Self reliant	1	1%
Skilled workforce	1	1%

Small town	1	1%
Unique shops	1	1%
Vibrant downtown	1	1%
Above average household incomes	2	1%
Affordable	2	1%
Chamber of Commerce	2	1%
Climate	2	1%
Low competition	2	1%
Quality of life	2	1%
Shop local awareness	2	1%
Community commitment to local businesses	3	2%
Customer loyalty	3	2%
Outdoor activities	4	3%
Stable economy	4	3%
Great place to live	5	4%
Social network	6	4%
Environment	7	5%
Recreational opportunities	7	5%
Tourism	8	6%
Friendliness	13	10%
Lifestyle	16	12%
Supportive community	16	12%
Location	28	21%
Total	147	

Survey Participants: 152
Question Respondents: 136
No Response Count: 16
Response Rate: 89%

Figure 84.: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Airport limitations	1	1%
Competition	1	1%
Economic climate	1	1%

Kootenay time or laissez fair attitude	1	1%
Lack of amenities	1	1%
Lack of motivation	1	1%
Lack of suppliers	1	1%
Planning and development process	1	1%
Poor road conditions	1	1%
Reliable transportation	1	1%
Small market	1	1%
Too dependent on tourism	1	1%
Transient population	1	1%
Vacant commercial buildings	1	1%
Weather	1	1%
Lack of local services	2	1%
Limited market	2	1%
Low population	2	1%
Available space	3	2%
Cost of doing business	3	2%
Internet access	3	2%
Low average income	3	2%
Resistance to change	3	2%
Cross border shopping (US/Alberta)	4	3%
Shipping and Receiving costs	6	4%
Geographic isolation	7	5%
Population (size/growth/aging)	7	5%
Tax structure	7	5%
Location	10	7%
Seasonality	10	7%
Development Constraints (Zoning/Bureaucracy/Permits)	11	8%
High cost of living	12	9%
Total	110	

Survey Participants: 152

Question Respondents: 136

No Response Count: 16

Response Rate: 89%

Figure 85.: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	121	84.62%
No	22	15.38%
Total	143	

Survey Participants: 152

Question Respondents: 143

No Response Count: 9

Response Rate: 94%

Figure 85b: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Access to capital	1	1%
Access to markets	1	1%
Economic seasonality	1	1%
Economy	1	1%
Geographic constraints	1	1%
Lack of an anchor industry	1	1%
Land availability	1	1%
Low income levels	1	1%
Negative attitude	1	1%
Shipping costs	1	1%
Small market	1	1%

Weather	1	1%
Affordable housing	2	2%
Airport service	2	2%
Competition	2	2%
Cost of living	2	2%
Internet access	2	2%
Job market is small	2	2%
Low population	2	2%
Skilled labour	2	2%
Zoning	2	2%
Low growth	3	3%
Poor road conditions	3	3%
Cost of doing business	5	4%
Tax structure	5	4%
Infrastructure supporting local economy	6	5%
Low economic diversification	6	5%
Availability of land	7	6%
Seasonality	8	7%
Population (size / growth / age)	13	11%
Resistance to change	13	11%
Developmental approval process	14	12%
Geographic isolation	14	12%
Total	127	

Survey Participants: 152
Question Respondents: 119
No Response Count: 2
Parent Question 'Yes' Respondents: 121
Parent Question Respondents: 143
Response Rate: 98%

Figure 86.: Level of service from business support providers	Not Applicable	% Not Applicable	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Responses
Basin Business Advisors	43	80%	2	4%	0	0%	3	6%	5	9%	1	2%	54
Chamber of Commerce	5	8%	2	3%	5	8%	11	18%	23	38%	15	25%	61
College Industry Liaison Officer	35	65%	0	0%	1	2%	1	2%	8	15%	9	17%	54
Community Futures	33	57%	5	9%	0	0%	1	2%	13	22%	6	10%	58
Continuing Education and Workforce Training	25	44%	1	2%	1	2%	4	7%	19	33%	7	12%	57
Economic Development Organization / Commission	34	64%	1	2%	2	4%	2	4%	9	17%	5	9%	53
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	48	87%	1	2%	0	0%	3	5%	3	5%	0	0%	55
Invest Kootenay	45	85%	2	4%	1	2%	2	4%	3	6%	0	0%	53
Kootenay Aboriginal Business Advocates Society	52	98%	1	2%	0	0%	0	0%	0	0%	0	0%	53
National Research Council Industrial Research Assistance	49	94%	1	2%	0	0%	0	0%	1	2%	1	2%	52
Scientific Research and Experimental Development Tax Incentive Program	50	96%	0	0%	0	0%	0	0%	1	2%	1	2%	52

Survey Participants: 109

Figure 87.: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	44	33.33%
No	88	66.67%
Total	132	

Survey Participants: 152
 Question Respondents: 132
 No Response Count: 20
 Response Rate: 87%

Figure 87b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Agricultural suppliers	1	3%
Cleaning services	1	3%
Courier service	1	3%
Distributors	1	3%
Heavy Equipment dealers	1	3%
Helicopter services	1	3%
Mining services	1	3%
Software developers	1	3%
Technology companies	1	3%
Wood Waste Management	1	3%
High Tech services	2	5%
Manufacturers	2	5%
Retail stores	2	5%
Meats & Dairy / Fruits and Vegetables / Grains	3	8%
Restaurants	3	8%
Tourism and Recreation	6	16%
Total	28	

Survey Participants: 152
 Question Respondents: 37
 No Response Count: 7

Parent Question 'Yes' 44
 Respondents:
 Parent Question 132
 Respondents:
 Response Rate: 84%

Figure 88.:Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Agriculture value-added industries	1	1%
Art gallery	1	1%
Educational services	1	1%
Grocery stores	1	1%
Health and Wellness	1	1%
Internet services	1	1%
Mountain biking	1	1%
Recreational services	1	1%
Recycling Services	1	1%
Restaurants	1	1%
Shipping companies	1	1%
Snow mobiling	1	1%
Airport services	2	2%
Conference Centre	2	2%
Construction	2	2%
Food businesses	2	2%
Forestry	2	2%
Transportation	2	2%

Green Businesses	3	2%
Hospitality	3	2%
Retail Stores	3	2%
Agriculture	4	3%
Creative businesses	4	3%
Arts & Culture	7	6%
Manufacturing	7	6%
Technology businesses	11	9%
Tourism	57	46%
Total	123	

Survey Participants: 152

Question Respondents: 124

No Response Count: 28

Response Rate: 82%

Figure 89.: Business competitiveness factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important	Respondents
Access to exporting and international markets	44	51%	19	22%	24	28%	87
Accessing capital	10	11%	21	24%	56	64%	87
Add or change in business, products or services	11	13%	12	14%	62	73%	85
Affordable shipping/freight	14	16%	18	21%	55	63%	87
Availability of telecommunications infrastructure and services	3	3%	3	3%	81	93%	87
Energy costs	6	7%	14	16%	67	77%	87
Exchange rate for Canadian dollar	7	8%	14	16%	65	76%	86
Expansion of workforce employees	11	13%	31	36%	45	52%	87
Improvement business management	3	4%	10	12%	71	85%	84
Improvement of customer services	1	1%	7	8%	79	91%	87
Improving worker productivity	13	15%	20	23%	54	62%	87

New market development locally	4	5%	10	12%	72	84%	86
New market development outside of region	10	11%	13	15%	64	74%	87
New product research and development	21	24%	11	13%	55	63%	87
Reliable air transportation	18	21%	23	26%	46	53%	87
Strategic alliances (joining with other businesses to provide products/services)	5	6%	7	8%	74	86%	86
Water/sewer availability	20	23%	8	9%	59	68%	87
Water/sewer costs	23	27%	12	14%	51	59%	86
Workforce skill development	7	8%	8	9%	72	83%	87
Workplace health and safety	8	9%	17	20%	62	71%	87

Survey Participants: 109

Figure 90.: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	5	6%	4	5%	23	27%	36	43%	16	19%	84
Investing in people and skills	7	8%	3	4%	21	25%	41	49%	12	14%	84
Leadership and management capacity	2	2%	2	2%	6	7%	48	58%	25	30%	83
Measuring impact of productivity efforts/ investments	10	12%	2	2%	29	35%	32	39%	10	12%	83
Networking and collaboration with other businesses	2	2%	5	6%	20	24%	36	43%	20	24%	83
Organizing work (structures & processes)	7	8%	0	0%	14	17%	46	55%	16	19%	83
Productive workplace culture	3	4%	2	2%	8	10%	47	56%	24	29%	84

Survey Participants: 109

Figure 91.: Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3)	Count	Percent of Question Respondents
Government	3	3%
Agriculture	6	7%
Manufacturing	8	9%
Other niche service businesses (e.g. services to seniors)	8	9%
Education	9	10%
Green or environmental businesses	15	17%
Technology-based businesses	17	20%
Arts	19	22%
Construction	19	22%
culture and creative businesses	19	22%
Forestry	20	23%
Health & wellness	21	24%
Relocation of people from urban centres	28	32%
Tourism	72	83%
Other	23	26%
Total	287	

Survey Participants: 109
Question Respondents: 87
No Response Count: 22
Response Rate: 80%

Figure 91b: Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please	Count	Percent of Question Respondents
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pick top 3): If <i>Other</i> please specify		
Hydroelectricity	1	1.15%
Recycling	1	1.15%
Senior Services	1	1.15%
Sports and recreation	1	1.15%
Transportation	1	1.15%
Mining	10	11.49%
Total	15	

Survey Participants: 109
 Question Respondents: 16
 No Response Count: 7
 Parent Question 'Other' Respondents: 23
 Parent Question Respondents: 87
 Response Rate: 70%

Figure 92.: Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
Yes	42	79.25%
No	11	20.75%
Total	53	

Survey Participants: 109
 Question Respondents: 53
 No Response Count: 56
 Response Rate: 49%

Figure 92b: Is your business impacted by its proximity to the Alberta border?: If Yes, please explain	Count	Percent of Question Respondents
Negative - Loss of sales to Alberta	1	3%
Positive - Alberta has higher recycling fees	1	3%

Positive - Workforce migration from Alberta	1	3%
Negative - Alberta competition	2	5%
Positive - Alberta tourists	5	13%
Positive - Alberta customers	28	70%
Total	38	

Survey Participants: 109
 Question Respondents: 40
 No Response Count: 2
 Parent Question 'Yes' Respondents: 42
 Parent Question Respondents: 53
 Response Rate: 95%

ASSESSMENT AND PLANS

Figure 93.: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	29	23%
Good	69	54%
Fair	26	20%
Poor	3	2%
Total	127	

Survey Participants: 152
 Question Respondents: 127
 No Response Count: 25
 Response Rate: 84%

Figure 94.: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	12	12%
Good	13	13%
Fair	1	1%
Not applicable	77	75%
Total	103	

Survey Participants: 152
 Question Respondents: 103
 No Response Count: 49
 Response Rate: 68%

Figure 95.: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	61	48%
Good	51	40%
Fair	10	8%
Poor	1	1%
Not applicable	3	2%
Total	126	

Survey Participants: 152
 Question Respondents: 126
 No Response Count: 26
 Response Rate: 83%

Figure 96.: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	10	10%
Good	11	11%
Fair	3	3%
Poor	2	2%
Not applicable	76	75%

Total	102	
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Survey Participants: 152
Question Respondents: 102
No Response Count: 50
Response Rate: 67%

Figure 97.: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
High	4	3%
Moderate	12	9%
Low	118	88%
Total	134	

Survey Participants: 152
Question Respondents: 134
No Response Count: 18
Response Rate: 88%

Figure 98.: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	5	4%
Moderate	13	10%
Low	114	86%
Total	132	

Survey Participants: 152
Question Respondents: 132
No Response Count: 20
Response Rate: 87%

APPENDIX B: NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM (NAICS) CODES

Transportation

- *Air transportation*
 - 4811 Scheduled air transport
 - 4812 Non-scheduled air transport
- *All other transportation industries*
 - 4821 Rail transportation
 - of which:
 - **Tourism sub-industries**
 - 482114 Passenger rail transportation
 - **Non-tourism sub-industries**
 - 482112 Short-haul freight rail transportation
 - 482113 Mainline freight rail transportation
 - 4831 Deep sea, coastal and great lakes water transportation
 - 4832 Inland water transportation
 - 4851 Urban transit systems
 - 4852 Interurban and rural bus transportation
 - 4853 Taxi and limousine service
 - 4854 School and employee bus transportation
 - 4855 Charter bus industry
 - 4859 Other transit and ground passenger transportation
 - 4871 Scenic and sightseeing transportation, land
 - 4872 Scenic and sightseeing transportation, water
 - 4879 Scenic and sightseeing transportation, other
 - 5A0510¹ Automotive equipment rental and leasing
 - of which:
 - **Tourism sub-industries**
 - 532111 Passenger car rental
 - 532120 Truck, utility trailer and RV (recreational vehicle) rental and leasing
 - **Non-tourism sub-industries**
 - 532112 Passenger car leasing

Accommodation

- 7211 Traveller accommodation
- 721A¹ RV (recreational vehicle) parks and recreational camps
 - of which:
 - **Tourism sub-industries**
 - 721211 RV (recreational vehicle) parks and campgrounds

- 721212 Hunting and fishing camps
- 721213 Recreational (except hunting and fishing) and vacation camps
- **Non-tourism sub-industries**
- 721310 Rooming and boarding houses

Food and beverage services

- 7220 Food services and drinking places
 - of which:
 - **Tourism sub-industries**
 - 72211 Full-service restaurants
 - 72221 Limited-service eating places
 - 72241 Drinking places (alcoholic beverages)
 - **Non-tourism sub-industries**
 - 72231 Food service contractors
 - 72232 Caterers
 - 72233 Mobile food services

Recreation and entertainment

- 51213 Motion picture and video exhibition
- 7110 Performing arts, spectator sports and related industries
 - of which:
 - **Tourism sub-industries**
 - 7111 Performing arts companies
 - 7112 Spectator sports
 - 7115 Independent artists, writers and performers
 - **Non-tourism sub-industries**
 - 7113 Promoters (presenters) of performing arts, sports and similar events
 - 7114 Agents and managers for artists, athletes, entertainers and other public figures
- 7121 Heritage institutions
- 713A¹ Amusement and recreation industries
- 7131 Amusement parks and arcades
- 7132 Gambling industries
- 7139 Other amusement and recreation industries
 - of which:
 - **Tourism sub-industries**
 - 71391 Golf courses and country clubs
 - 71392 Skiing facilities
 - 71393 Marinas
 - 71395 Bowling centres
 - 71399 All other amusement and recreation industries
 - **Non-tourism sub-industries**
 - 71394 Fitness and recreational sports centres

Travel services

- 5615 Travel arrangement and reservation services