



# COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

*REPORT ON KASLO AND AREA BUSINESSES  
SPRING 2015*



*The Kaslo Business Retention and Expansion project is a community-driven effort undertaken by the Village of Kaslo and North Kootenay Lake Community Services Society (NKLCSS). It focused on identifying the needs of our existing businesses including the non-profit sectors throughout RDCK Area D. The project was undertaken with support from the Kaslo Chamber of Commerce*



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## EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 80 businesses in the Village of Kaslo and surrounding area<sup>1</sup> between 2014 and 2015. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

### KEY RESEARCH FINDINGS

Select survey results are summarized below.

| Survey Module                   | Finding   |
|---------------------------------|---|
| <b>Company Information</b>      | The highest number of respondents' businesses are classified as 'Retail and Wholesale Trade', 'Other Services' and 'Manufacturing' under the North American Industry Classification System (NAICS). |
|                                 | Business opportunities was the most frequently cited reason given for businesses to locate in Kaslo.  |
|                                 | Most businesses do not have any other locations.  |
|                                 | Most businesses report that they are in a growing or maturing phase.  |
| <b>Local Workforce</b>          | Most businesses employ less than five employees.  |
|                                 | The employment trends have historically remained the same and are expected to remain stable in the future.  |
|                                 | Bookkeeping, computer training and web development were the most commonly listed as key training areas.   |
| <b>Sales</b>                    | 50% of businesses indicated that the market for their product or service is increasing.   |
|                                 | 73% of businesses report that their sales are to customers within the local area.   |
|                                 | Nearly half of all business source the majority of their supplies from the local area.  |
| <b>Facilities and Equipment</b> | 65% of businesses own the facility in which they operate.   |
|                                 | Nearly half of businesses plan to expand within 3 years, with 95% of those indicating that expansion will occur within the community.   |
|                                 | The top barrier to expansion is financing.  |
| <b>Government Services</b>      | Top rated government services include access to highways and roads, disposal of waste, recycling, water and sewerage supply and access to markets.  |
|                                 | Improving access to airport facilities, availability of road transport services and telecommunications are the government services most in need of improvement.                                     |
|                                 | The West Kootenay Regional Airport is the most used airport by local businesses.  |
| <b>Business Climate</b>         | The overall business climate was rated as fair, and the majority of businesses believe that the business climate will improve over the next five years.   |
|                                 | Business climate factors that received the highest ratings include cultural and recreational amenities and workforce quality.   |
|                                 | Businesses most commonly listed Kaslo's supportive nature as its greatest strength  |

<sup>1</sup> Includes Argenta, Ainsworth, Meadow Creek, Cooper Creek

|                             |  |
|-----------------------------|--|
|                             | as a place to do business.   |
|                             | The most commonly cited barriers to growth are remote location, health care services and limited employment opportunities. |
| <b>Assessment and Plans</b> | The overall health of their company was rated as excellent by 19% of businesses, and good by 56% of businesses.            |
|                             | Only 3% of businesses are at a high risk of closing, and only 4% are at risk of downsizing.                                |

## NEXT STEPS AND POTENTIAL ACTIONS

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

### *Small, locally owned businesses*

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

### *Youth Employment*

Findings indicate that employees under the age of 26 are in the minority. Increasing youth involvement in the local workforce could be encouraged. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

### *Business Growth & Expansion*

44% of businesses in the region report being in a growth cycle, and 51% indicate that they are planning to expand within the next three years. The majority of those businesses planning to expand indicate their existing site is adequate, and the vast majority of expansion plans are expected to occur within the community. Businesses also report that employment rates are stable, with little change anticipated. Actions in this area could include exploring ways to support existing businesses as they plan for local expansion/growth.

### *Training*

Businesses identified a need for training in the areas of bookkeeping and computer related training such as web development and social media usage. Future initiatives could include identifying shared training needs, and working with educational institutions to ensure local skill requirements are considered in local programming. Awareness of the regional training opportunities currently available could also be promoted within the Kaslo business community.

### *Succession and Business Planning*

Business and succession planning are critical to the health and longevity of businesses, yet only 14% of respondents indicated that they have a formal succession plan and only 34% have an up-to-date business plan. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual

circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses.

### *Economic Stability & Diversification*

The small population base and remote location were cited most frequently by local businesses as the greatest weaknesses and its greatest barrier to growth. While there is substantial support for local procurement, increasing the support for existing businesses could improve business stability and address the challenges that a small population base and remote location bring. Actions could also include supporting businesses to expand to virtual markets made available through improved broadband access in Kaslo. Tourism was also the most frequently cited sector that could be attracted to the region. With most businesses expressing optimism for an improved business climate over the next five years, and the supportive nature of the community as its greatest strength, there is much positive support and social capital to build on the work already occurring in this area.

### *Government Services*

A recurring theme related to government services was the need for improved telecommunications/internet service as well as concerns with availability of health care services. Actions related to telecommunications/internet service could include promoting the newly implemented fibre optic service in Kaslo, as well as facilitating a stakeholder meeting to explore concerns and consider how improvements can be achieved with groups such as the Kootenay Association for Science and Technology (KAST), the Kaslo infoNet Society (KiN), and the Columbia Basin Broadband Corporation. The lack of 24/7 health care services/emergency health care service was frequently cited as a barrier to growth in the community, and was also referenced by seven respondents when considering what government services were poor or fair. Actions related to the provision of health care services could include establishing a task force to, explore related strategic planning and actions undertaken by other communities in the region and possible applied research linkages to Selkirk College's nursing faculty.

### *NGO Sector*

Kaslo hosts a number of Non-Governmental Organizations (NGOs). This sector is an important component of the social fabric and a solid determinant of economic well-being for the area. The BRE Project Lead, together with the Sustainable Economic Development Committee, identified 12 local NGOs for the BRE. The NGO sector representatives: are long-term operators (mostly longer than 10 years), employ 57 people (5 FT, 21 PT, 31 Temp), and provide training to their mostly skilled workforce. They represent sales or services valued at over \$4M and plan local investments valued over \$10M.

The NGO sector could benefit from: management and technical training support, assistance in securing funding, suitable lands for expansion and broadband access. The NGO sector's largest concerns with public infrastructure relate to: airport access, transportation and logistics, and providing public restrooms. Currently, only two respondents rated the business climate as good or excellent (10 rating it fair to poor), but most indicate it is improving.

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## PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey<sup>2</sup> conducted in the Village of Kaslo and area during 2014/2015. The Project Comeback Coordinator from North Kootenay Lake Community Services Society (NKLCCS) acted as the community lead for the project. The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

### THE BRE CONCEPT

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

### PROJECT OBJECTIVES

Objectives specific to the Kaslo BRE project were as follows:

1. Identify the needs, concerns, and opportunities of existing local businesses in order that, where appropriate, local action can be taken to respond to the businesses' needs or development opportunities;
2. Learn of the future plans of the region's local businesses with respect to expansion, relocation and /or retention and follow-up where assistance can be provided;
3. Demonstrate the community's pro-business attitude and develop an effective means of communication with local businesses;
4. Encourage the business community's active involvement in economic development.

## 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

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<sup>2</sup> Short and Long BRE surveys can be downloaded from: <http://cbrdi.ca/research-areas/applied-research/business-retention-expansion/>



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, 13 region-specific questions were appended to the base BRE survey. This report does not include these 13 additional questions as the community chose not to include them in their survey.

## **THE DATA SET**

To generate an initial set of potential research participants, local business license databases and the Chamber of Commerce membership list was utilised as well as individual lists submitted from the Sustainable Economic Development committee. From these sources, over 250 businesses and non-profits were identified within the Village of Kaslo and surrounding area.

Businesses were sorted into the North American Industry Classification System (NAICS) categories to ensure equal representation of each sector. Using a random number generator, 80 businesses were selected to complete the survey. Each business was individually contacted by email or phone to set up a meeting to complete the survey in person. If the organization was not available, another business was randomly selected from the same NAICS category to ensure equal representation.

In total 80 respondents participated in the BRE survey. The number of respondents varies based on responses to individual questions.

## **DATA COLLECTION**

An additional employee was retained to assist the NKLCSS with completing the 80 interviews. Each interview included arranging and undertaking the structured interviews which took between 1 to 1.5 hours, plus data entry. In total the process took approximately 3 hours per interview.

## **DATA INPUT, ANALYSIS AND REPORTING**

Data was entered into the ExecutivePulse system by the Project Lead and assistant. To ensure confidentiality and data security, company-level data was only made accessible to RDI staff and the Kaslo BRE Advisory Committee.

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

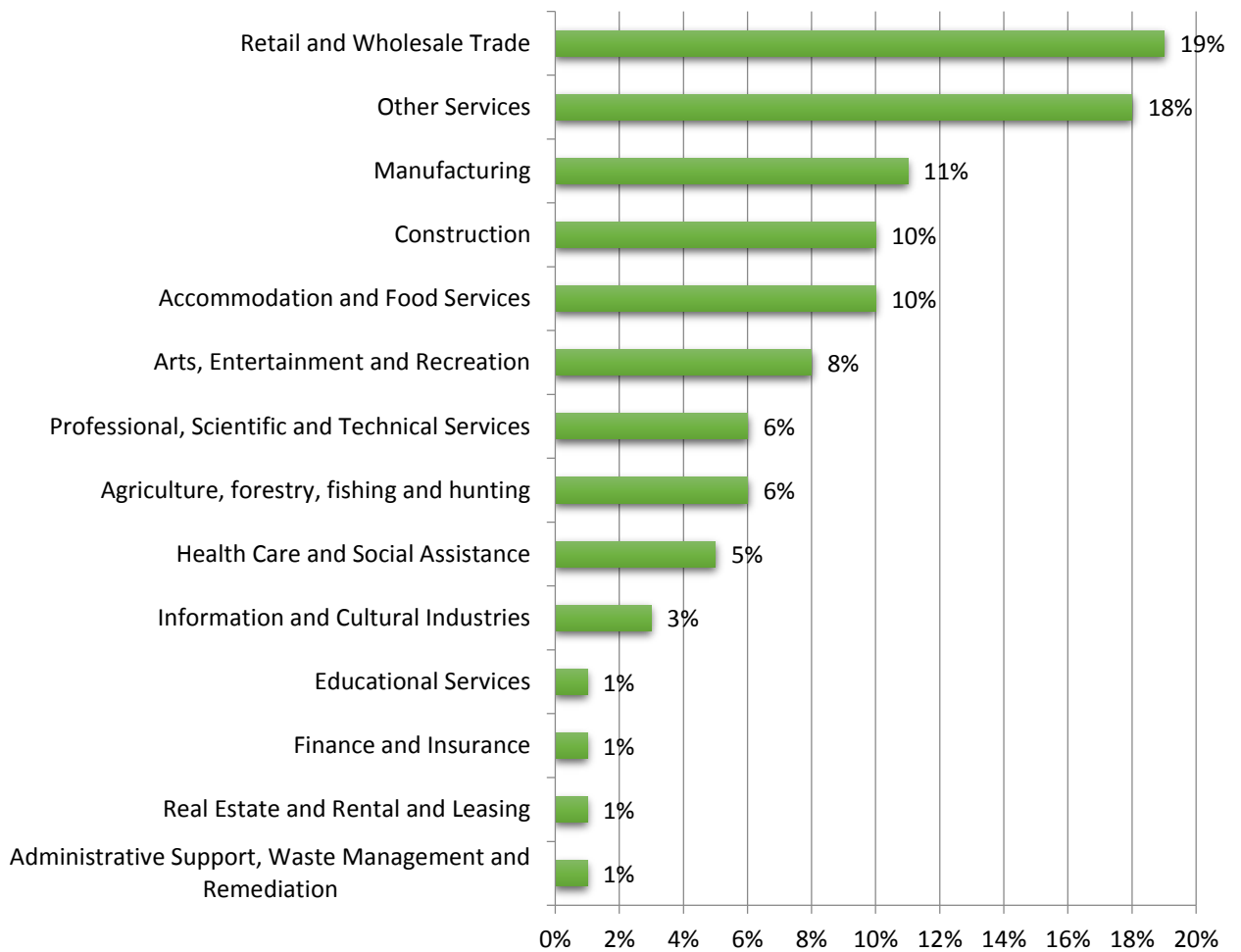
# RESEARCH FINDINGS

## COMPANY INFORMATION

### Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Retail and Wholesale Trade (19% or 15 respondents), Other Services (18% or 14 respondents) which includes a range of businesses from repair services to various societies, and Manufacturing (11% or 9 respondents).

**Figure 1: Industry classification**



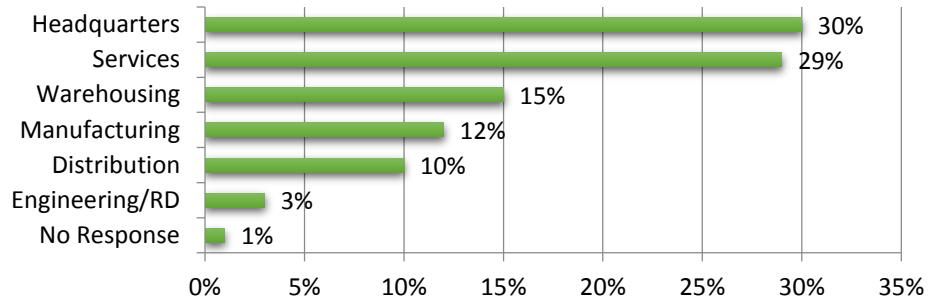
*Note: 80 respondents*

### Facility Function

The majority of respondents (30% or 58 respondents) indicated that their facility provides the headquarters, nearly matching that is the indication that services are also provided (29% or 57

respondents). Other primary functions include warehousing (15% or 29 respondents) and manufacturing (12% or 24 respondents). Fewer respondents indicated that their facility serves as distribution or engineering/R&D purposes<sup>3</sup>.

**Figure 2: Facility function(s)**

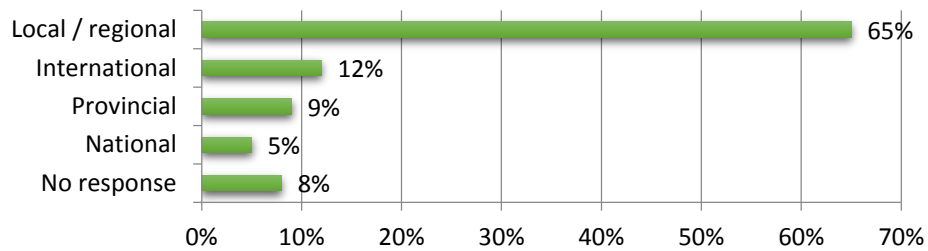


*Note: 80 respondents*

### Competition

The vast majority of competition (65 % or 63 responses) reported was coming from the local or regional area<sup>4</sup>.

**Figure 3: Location of primary competitors**



*Note: 80 respondents*

<sup>3</sup> Multiple functions were listed by respondents resulting in more responses than number of respondents.

<sup>4</sup> Multiple competitors were listed by respondents resulting in more responses than number of respondents.

## Factors for Success

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



When asked what factors made their company successful in this region, the highest number of respondents (21 % or 11 businesses) cited both **Demand for Services Provided and Quality Products** (13% or 12 businesses). **Location** and **Community Support** (9% or 9 businesses) were also discussed frequently.

*"I had the qualifications and there was a need for my services."*

*"We needed a change. We needed to escape the big city. We saw an opportunity to take over a struggling business and hopefully make life in general better for ourselves and this community and have some fun along the way."*

*"I was a part of the Community Futures Program and they recognized that I had a hobby that they thought I could develop into a business."*

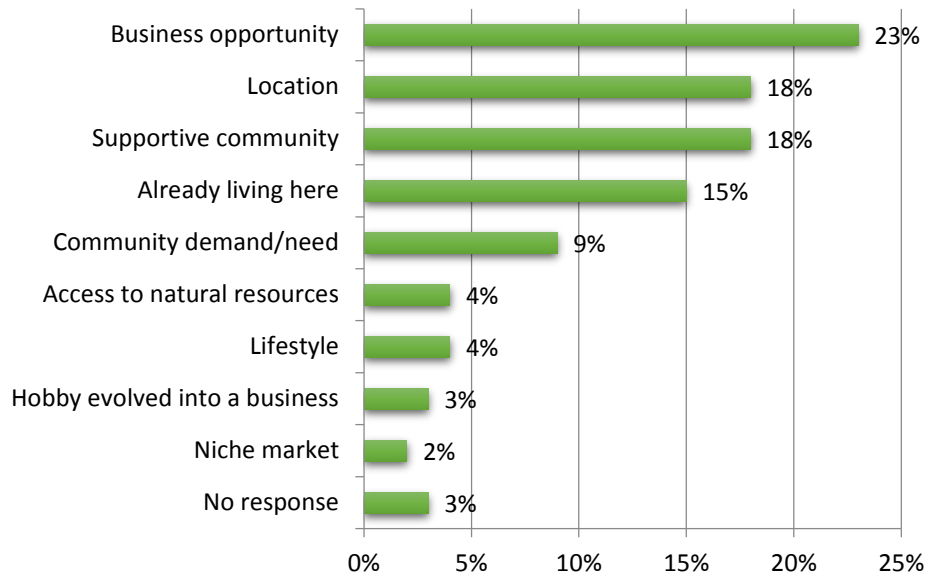
*"I moved here first and then created my business. I moved here for the rural environment and the rich community."*

*"I lived here my whole life (Kaslo/Meadow Creek). If you want to live here, you have to make something yourself so "build what you want to do""*

## Choosing Kaslo

Business opportunities (23% or 21 respondents) was the most frequently cited reasons given for businesses to locate in Kaslo. The location and the supportive community were both cited by 18% of respondents (16 respondents).

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

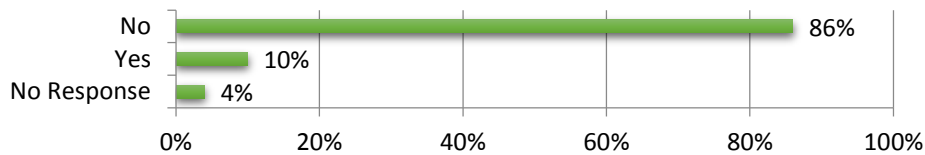


*Note: 80 respondents*

### *Other Locations*

86% of respondents (69 respondents) indicated that they do not have any other locations.

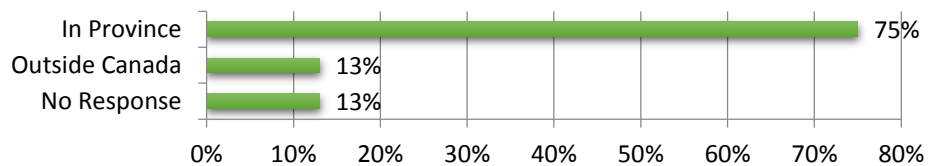
**Figure 6: Other Locations**



*Note: 80 respondents*

75% of those respondents with other locations (6 respondents) are in other areas of the province, 13% (1 respondent) are in other parts of Canada and 13% (1 respondent) indicated that their company has another location outside of Canada.

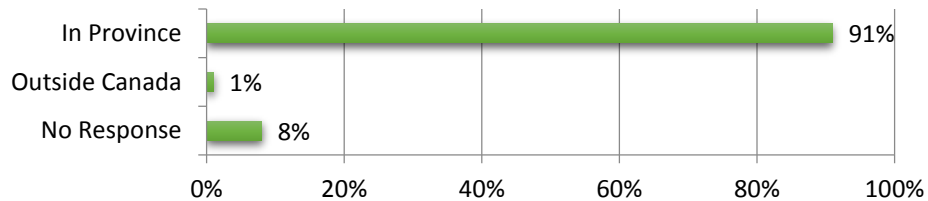
**Figure 7: Location of Other Locations**



*Note: 8 respondents*

91% (73 businesses) of respondents reported that their headquarters are located in British Columbia, and only 1% (1 business) indicated that their headquarters are located in another country. No businesses indicated that their headquarters were in other parts of the country.

**Figure 8: Location of headquarters**

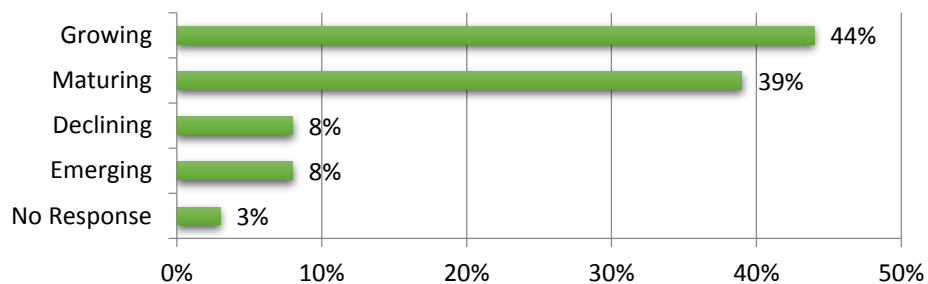


*Note: 80 respondents*

### Age and Life Cycle Stage

Nearly half of respondents (44% or 35 respondents) reported that their business is in the 'growing' life cycle stage. Another 39% (31 businesses) indicated that their business is in the 'maturing' stage. Only 8% (6 businesses) indicated that they were in the 'emerging' or 'declining' stages.

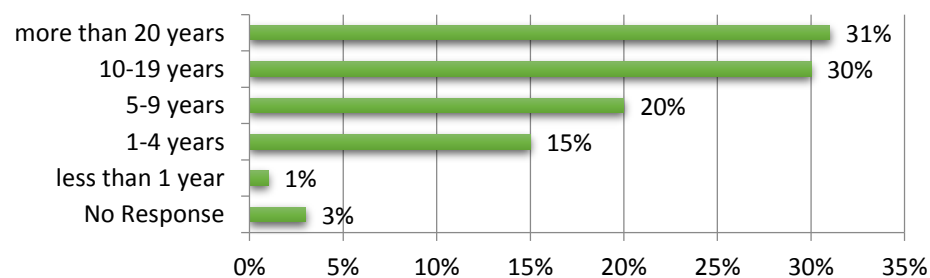
**Figure 9: Life cycle stage**



*Note: 80 respondents*

Most businesses (31% or 25 respondents) reported that they have been in business for more than 20 years or from between 10 – 19 years (30% or 24 respondents).

**Figure 10: Length of time in business**

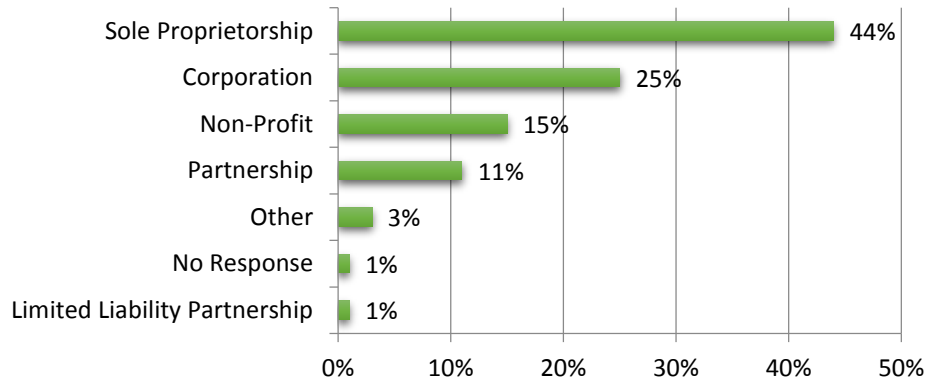


Note: 80 respondents

### Ownership and Management

Most respondents (44% or 35 respondents) indicated that their business is classified as a sole proprietorship, while 25% (20 respondents) indicated that they are a corporation. The third most common type of business ownership is non-profit (15% or 12 respondents). The remainder of businesses are registered as a partnership (9 respondents), other type of business (2 respondents), or limited liability partnership (1 respondent).

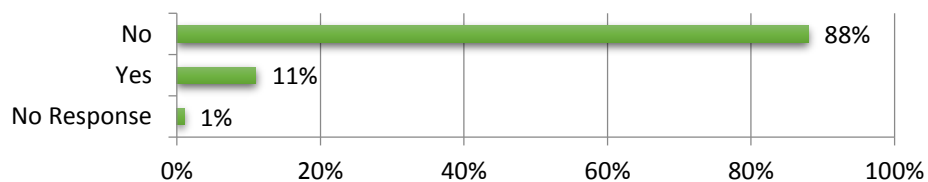
Figure 11: Type of business



Note: 80 respondents

88% of businesses (70 businesses) have not seen a management or ownership change in the last 5 years, while just 11% of businesses (9 businesses) have changed management and/or ownership over that same period of time. 8 businesses (10%) are expecting an ownership change in the near future. Of the 9 respondents that have seen changes in management and or ownership, 78% (7 businesses) report that change has had a positive impact.

Figure 12: Ownership and management changes in last 5 years

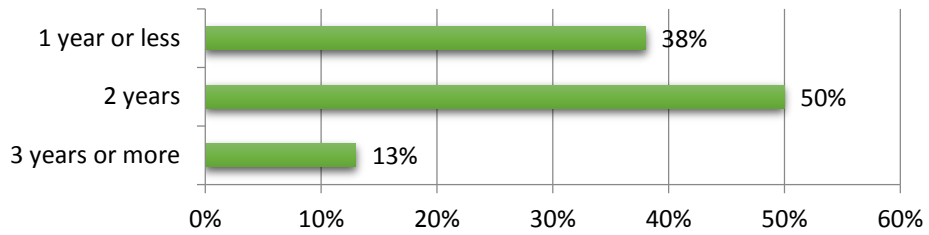


Note: 80 respondents

### Succession and Business Plans

Of the eight businesses that responded and reported a pending ownership change, 4 (50%) expect the change will happen in 2 years, 3 (38%) expect the change to occur in one year or less and 1 (13%) expects the process to take 3 years or more.

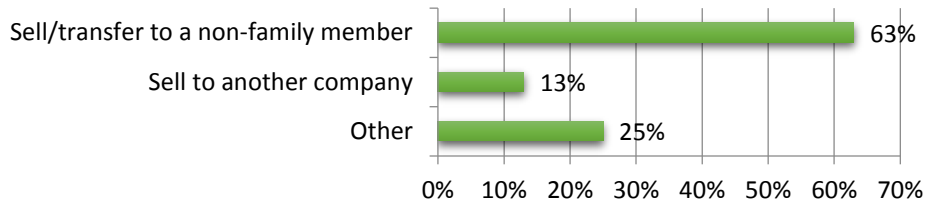
**Figure 13: Anticipated timeline for ownership change**



*Note: 8 respondents*

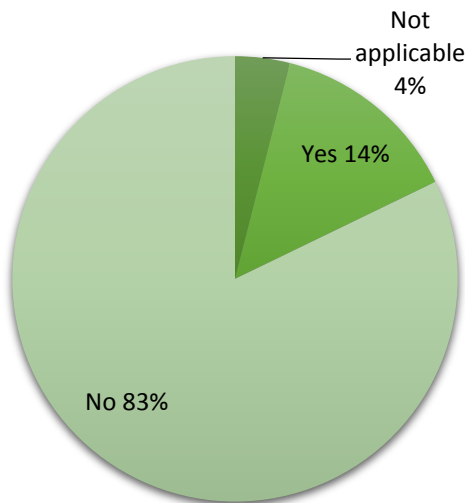
63% of respondents (5 respondents) expect that the current owner will exit the business by selling it to a non-family member, while only 13% (1 respondent) expect it to be sold/transferred to another company.

**Figure 14: Anticipated exit strategy**



*Note: 8 respondents*

**Figure 15: Existence of formal succession plan**

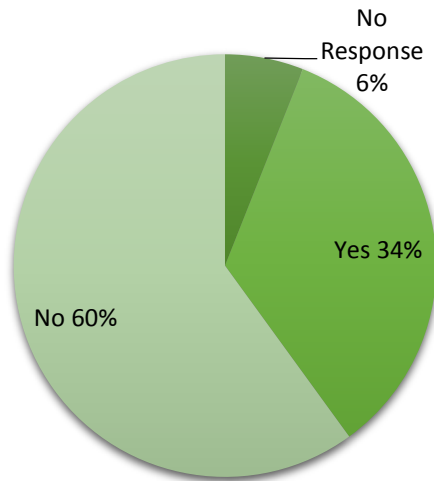


Only 14% (11 respondents) of respondents reported that they have a formal succession plan in place. 36% (4 respondents) of those with a succession plan indicated that they had assistance in its'preparation. Assistance came from a variety of sources: spouses, CBT, lawyers, local government and accountants.

*Note: 80 respondents*



**Figure 16: Existence of current business plan**



Over half of all respondents (60% or 48 respondents) indicated that they do not have a business plan in place.

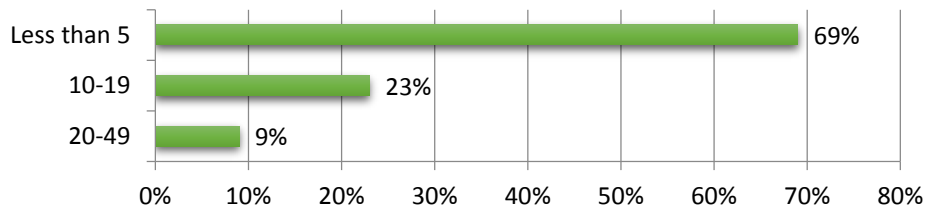
*Note: 80 respondents*

## LOCAL WORKFORCE

### *Size of Workforce*

The 80 businesses interviewed reported a total of 478 employees. 69 % or 55 of the businesses surveyed indicated that they have less than five employees and just 9% or 7 of the businesses indicated that they have over 20 – 49 employees. There are no businesses with over 50 employees.

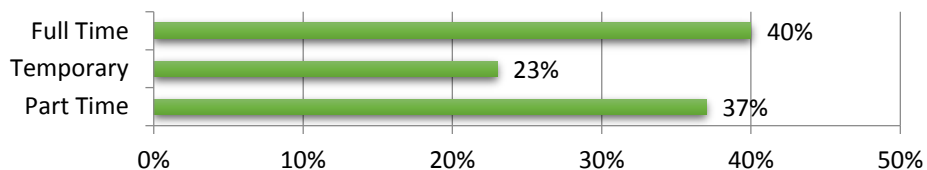
**Figure 17: Total number of employees**



*Note: 80 respondents*

40% (190) of employment positions at surveyed businesses are full-time, 37% (176) are part-time and 23% (112) are temporary.

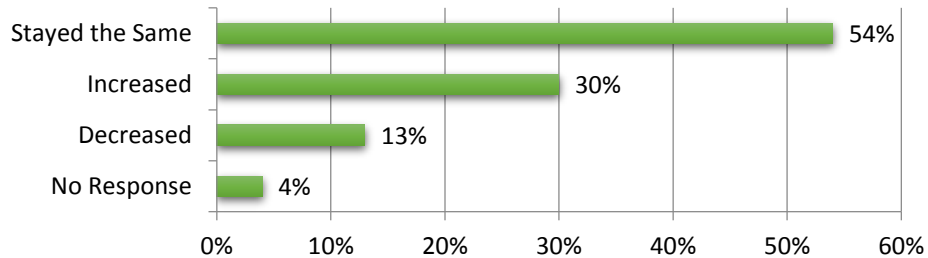
**Figure 18: Nature of employment**



*Note: 80 respondents*

54% of respondents (43 businesses) indicated that the number of employees at their business has stayed the same historically. While 30% (24 businesses) indicated that the size of their workforce has increased. Only 13% (10 businesses) indicated a decrease.

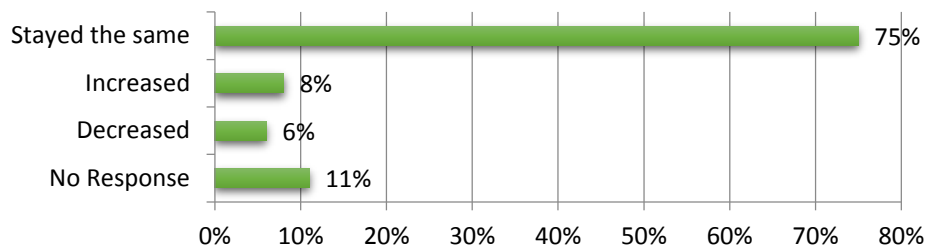
**Figure 19: Historical Employment trend<sup>5</sup>**



*Note: 80 respondents*

The last three years has seen stable growth in the size of the full-time workforce, with 75% of businesses (60 respondents) reporting that the number of full time employees has remained constant.

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



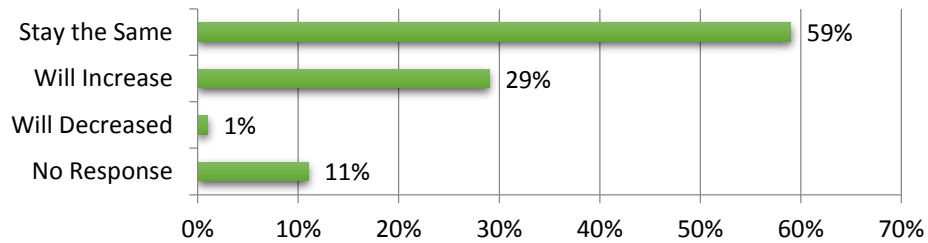
*Note: 80 respondents*

59% of businesses (47 respondents) interviewed expect the size of their full-time workforce will stay the same over the next 3 years, while 29% (23 respondents) expect it to increase. Just 1% (1 respondent) expect a decrease over the next 3 years.

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<sup>5</sup> The question considered a 10 year historical trend.

**Figure 21: Full time employment trend over next 3 years**

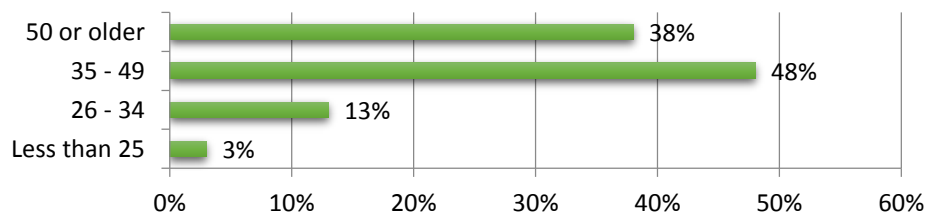


*Note: 80 respondents*

### *Workforce Demographics*

Of the responses received, 48% (38 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 38% (30 respondents) of businesses indicated that the majority of their employees were aged 50 and older.

**Figure 22: Age of the majority of essential employees**



*Note: 80 respondents*

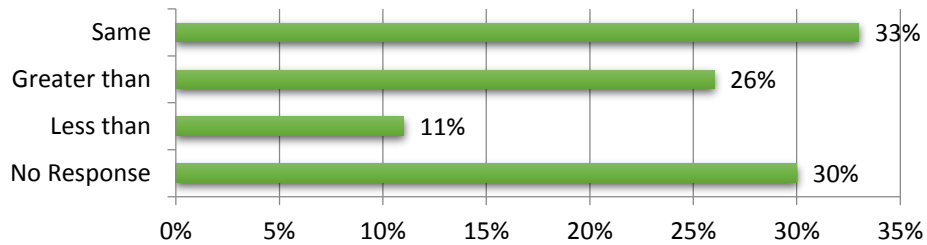
### *Wages*

When reporting on average wages for skilled or professional workers, the most common response (25% or 20 businesses) indicated they pay between \$20 and \$29 per hour. The most commonly reported average wage for semi-skilled workers (28% or 22 businesses) was under \$10 and the most commonly reported average wage for entry-level workers (45% or 36 businesses of respondents) was less than \$10. 33% of respondents (26 respondents) reported that their wage scale is similar to other businesses in the region.<sup>6</sup>

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<sup>6</sup> Detailed wage data is found in Appendix A.

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

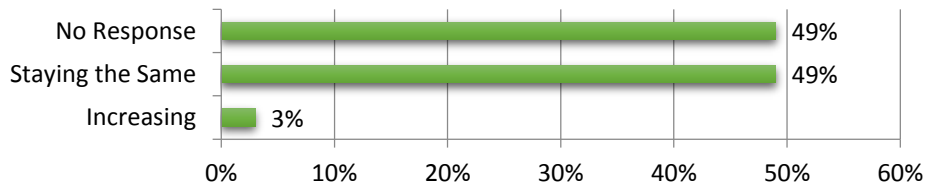


*Note: 80 respondents*

**Recruitment and Retention**

Of those businesses that responded, 49% (39 respondents) indicated that the number of unfilled positions at their company would remain constant.

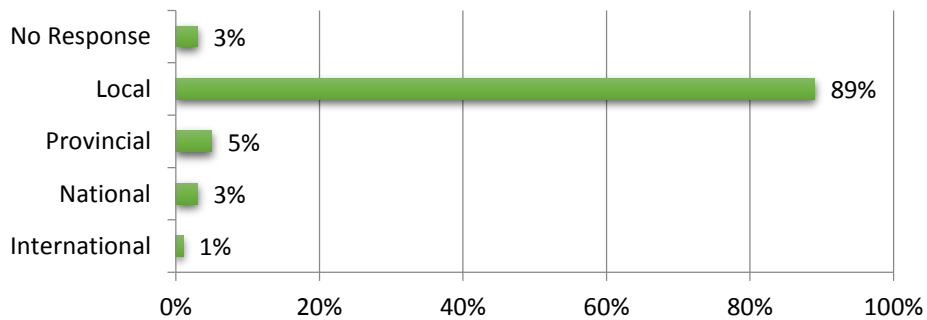
**Figure 24: Trend in unfilled positions**



*Note: 80 respondents*

The majority of respondents (89% or 71 respondents) reported that they primarily recruit employees locally. Just 5% (4 respondents) recruit provincially, while 3% (2 respondents) report that they recruit nationally, and 1% (1 respondent) reported international recruitment.

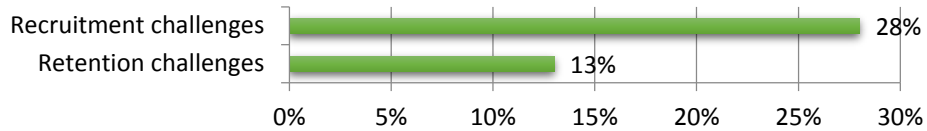
**Figure 25: Location of workforce recruitment**



*Note: 80 respondents*

Of the 80 respondents, 28% (22 respondents) indicated that they have experienced recruitment challenges and 13% (10 respondents) indicated that they have experienced retention challenges.

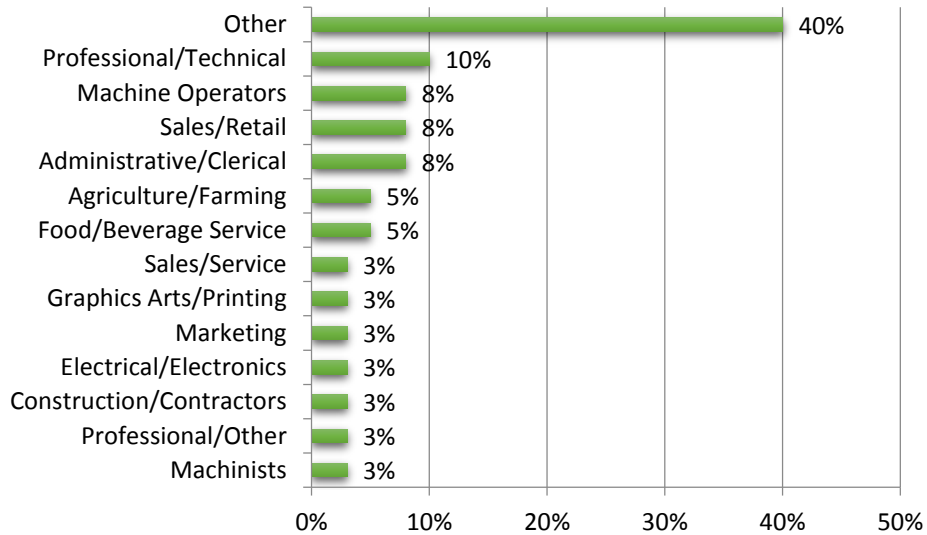
**Figure 26: Recruitment and retention challenges**



*Note: 80 respondents*

Of the 22 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include professional/technical (10% or 4 respondents), machine operators sales/service, sales/retail, and administrative/clerical personnel were all cited by 8% or 3 respondents as current areas of recruitment. The responses included in the ‘other’ categories charted below are detailed in Appendix A.

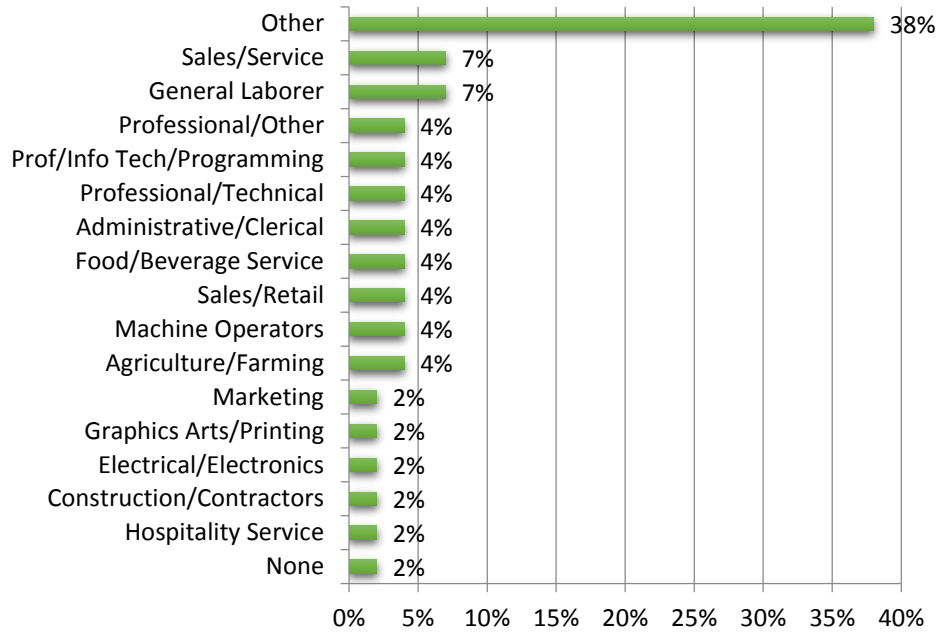
**Figure 27: Current recruitment areas**



*Note: 22 respondents*

Only 34% of respondents (27 respondents) anticipate future recruitment difficulties within the next 3 to 5 years. The most commonly anticipated recruitment areas which may prove challenging include sales/service (7% or 3 respondents) and general labour (7% or 3 respondents). The responses included in the ‘other’ categories charted below are detailed in Appendix A.

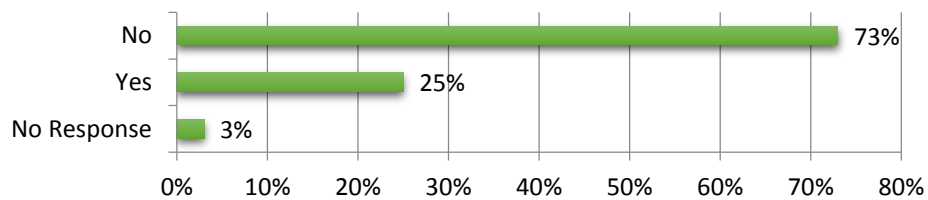
**Figure 28: Future areas where recruitment may be challenging**



*Note: 27 respondents*

Only 25% of respondents (20 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. Suggestions include creating a local job bank (35% or 7 respondents), expand wage subsidy programs (i.e. funding for internship or youth employment) (10% or 2 respondents), and encourage young people to live and work in Kaslo (10% or 2 respondents).

**Figure 29: Strategies to overcome employee recruitment challenges**

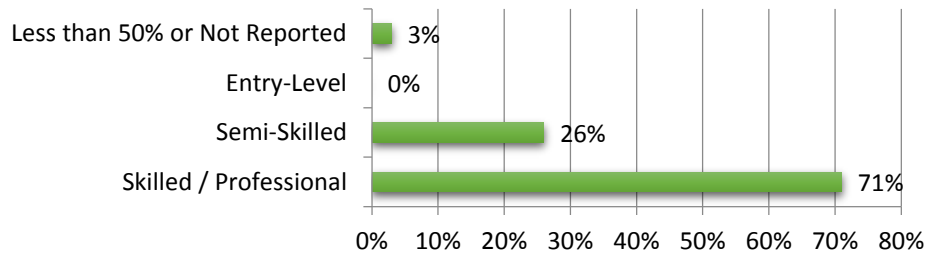


*Note: 80 respondents*

*Skills and Training*

The majority of respondents (71% or 57 respondents) indicated that over half of their workforce is comprised of skilled or professional workers and 26% (21 respondents) indicated that their workforce is mainly semi-skilled workers.

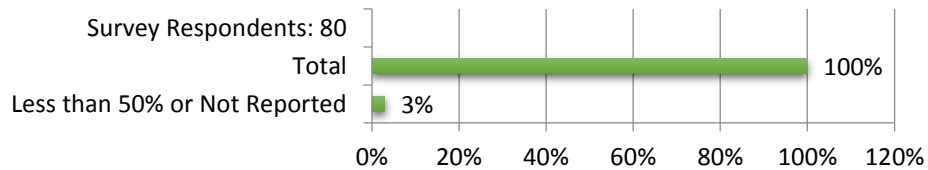
**Figure 30: Skill level of majority of workforce**



*Note: 80 respondents*

45% (36 respondents) indicated that there is a training budget to upgrade employee skills. 76% (61 businesses) indicated that their company offers in-house training and 21% (17 businesses) use contracted training.

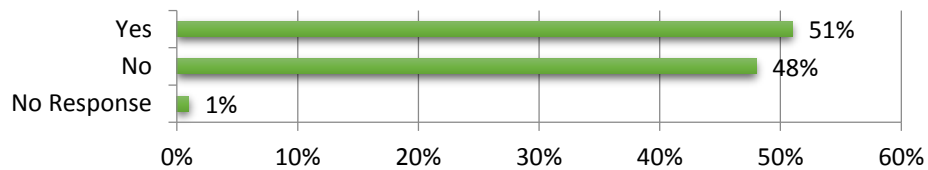
**Figure 31: Training Budget**



*Note: 80 respondents*

51% of respondents (41 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

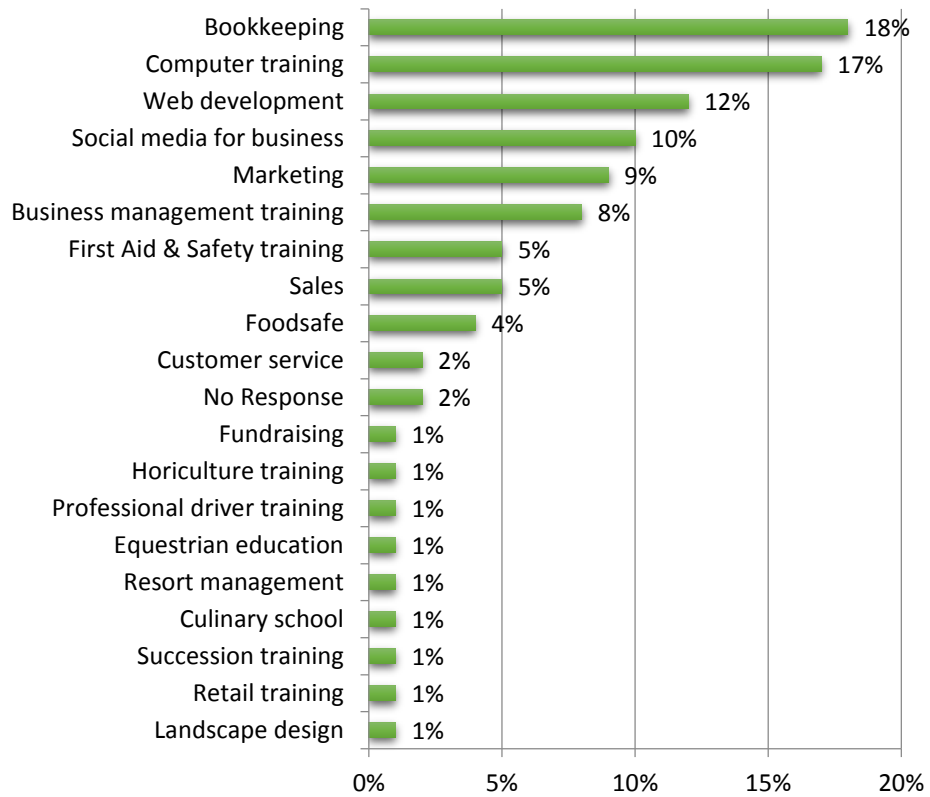
**Figure 32: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills**



*Note: 80 respondents*

78% or 62 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were bookkeeping (18% or 18 businesses), computer training (17% or 17 businesses), and web development (12% or 12 businesses)

**Figure 33: Training or professional development needs**

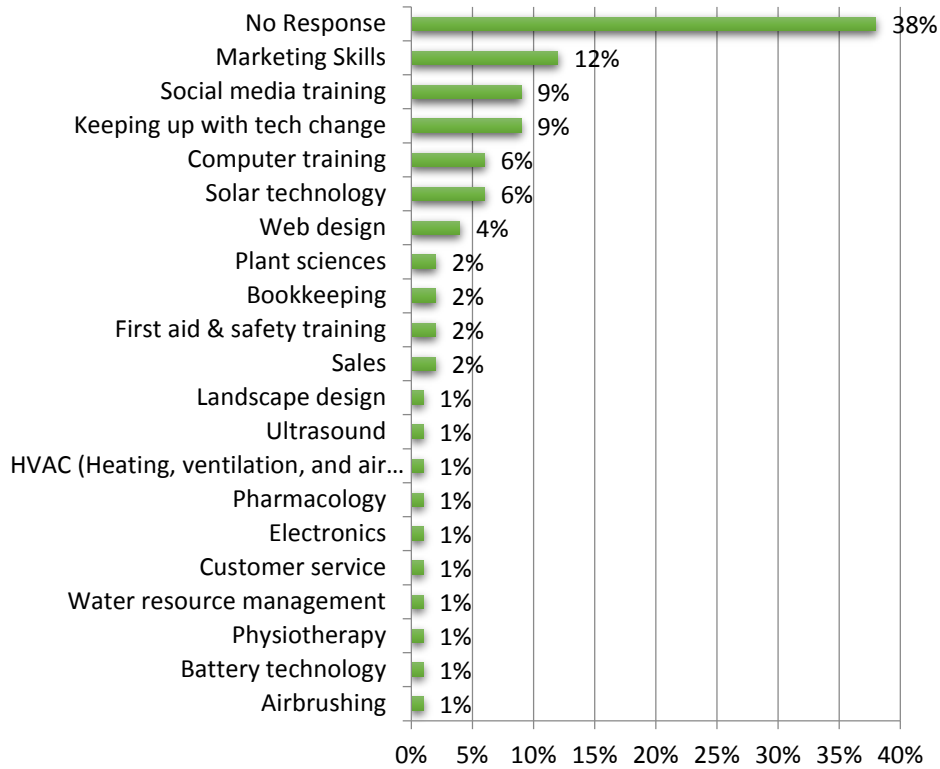


*Note: 62 respondents*

When asked what new training might need to be considered in the next five years, the most commonly cited response was in the area of marketing (12% or 13 businesses), social media (9% or 9 businesses) and technological changes (9% or 9 businesses).



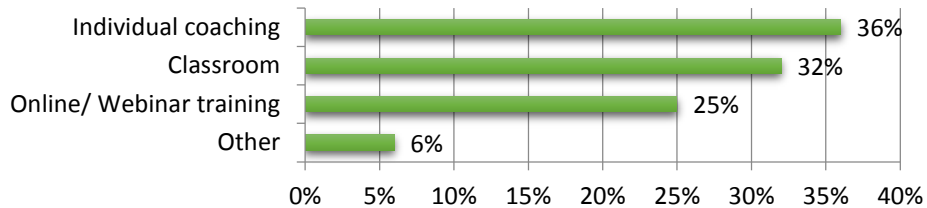
**Figure 34: Areas for new Training in next five years**



*Note: 80 respondents*

36% of respondents (57 businesses) stated that they prefer training when it is delivered through an individual coaching format, while 32% (50 businesses) preferred classroom style, and 25% (40 businesses) expressed a preference for online/webinar style training.

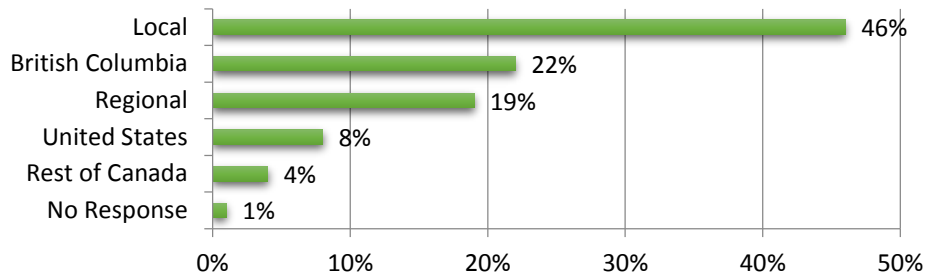
**Figure 35: Preferred modes of training**



*Note: 80 respondents*

46% of respondents (51 businesses) typically seek locally available training opportunities, and 19% (21 businesses) travel to other areas in the region for their training. 22% (25 respondents) seek training in the province. Fewer training opportunities are sought elsewhere in the country or in the United States.

**Figure 36: Usual training locations**



*Note: 80 respondents*

### Unions

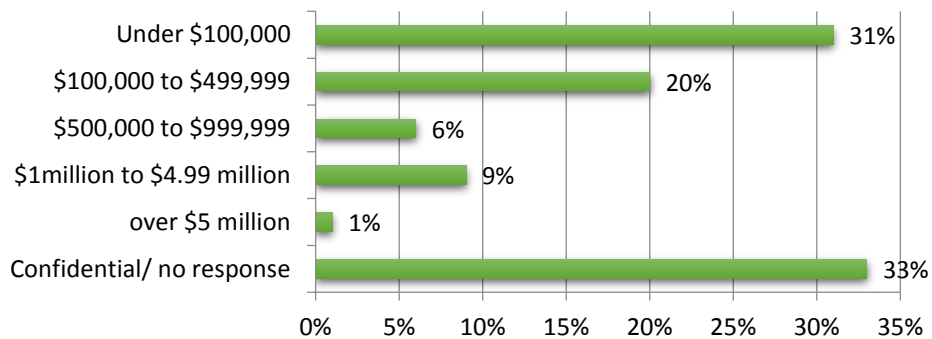
Two businesses (3%) reported that they have union status.

## SALES

### Market Size and Share

The highest number of respondents (25 businesses or 31%) reported annual sales under \$100,000. The second highest number of respondents (16 businesses or 20%) reported annual sales between \$100,000 and \$499,999. 33% (26 businesses) of respondents did not share annual sales information.

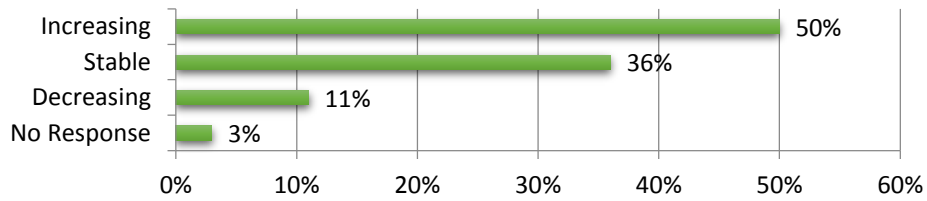
**Figure 37: Annual sales**



*Note: 80 respondents*

The majority of businesses interviewed (50% or 40 businesses) indicated that the size of the market for their product or service is increasing. Another 36% (29 businesses), reported that the market is stable.

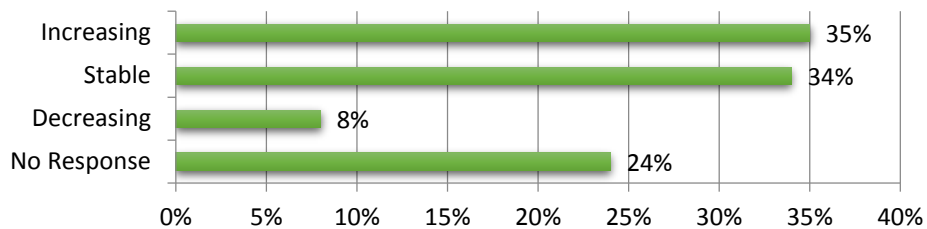
**Figure 38: Status of market for product/service**



*Note: 80 respondents*

35% (28 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 34% (27 businesses) indicated that it is stable. A small number of respondents (8% or 6 businesses) indicated that their market share is decreasing.

**Figure 39: Market Share in Comparison to Competitors**

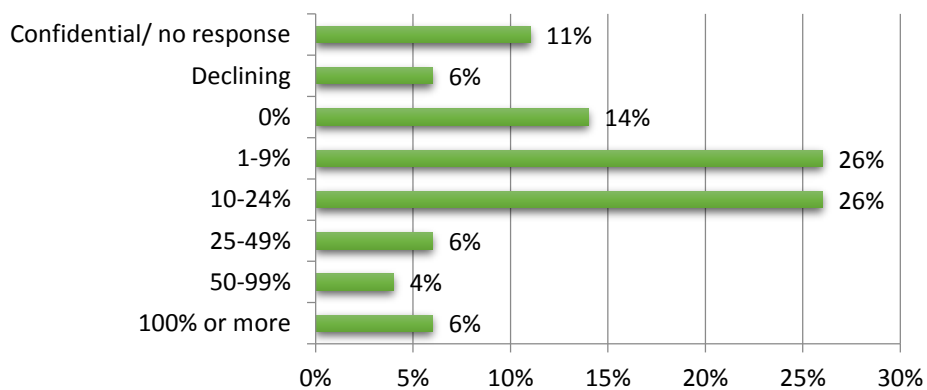


*Note: 80 respondents*

### *Growth*

26% of respondents (21 businesses) expect to see low growth in sales in the realm of 1 – 9%. Moderate growth in sales of 10-24% over the next year is also projected by 26% of respondents (21 businesses). 14% (11 businesses) of respondents expect their sales to remain stagnant, while a further 6% (5 businesses) expect sales to decline.

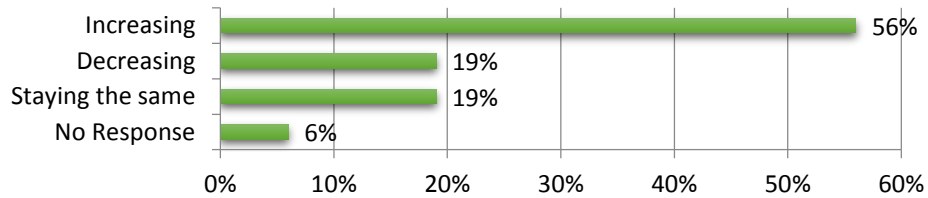
**Figure 40: Projected sales growth in the next year**



Note: 80 respondents

The majority of responses (56% or 45 businesses) indicated that sales at their business have increased over time, 19% (15 businesses) indicated that sales have remained relatively stable and 19% (15 businesses) reported that sales have declined.

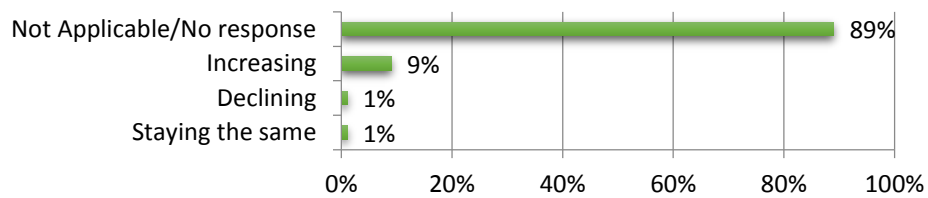
**Figure 41: Historic sales trend at this location**



Note: 80 respondents

Of the few businesses that have parent companies, the historic sales trend appears to be increasing according to 9% (7 respondents) of the businesses.

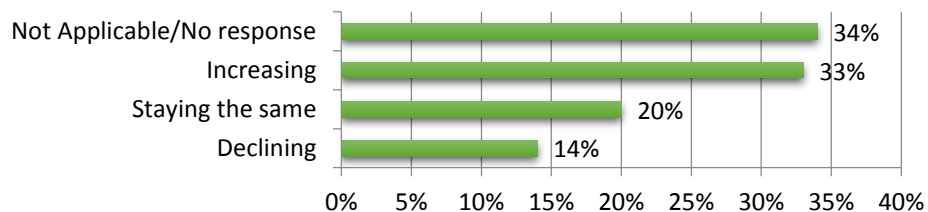
**Figure 42: Historic sales trend at parent company**



Note: 80 respondents

33% percent of respondents (26 businesses) reported that sales within their industry have been increasing while 20% (16 businesses) reported that they have remained stable.

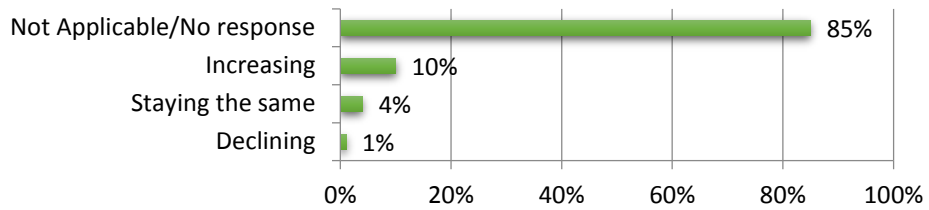
**Figure 43: Historic sales trend within the industry**



Note: 80 respondents

10% (8 businesses) indicated that their export sales have been increasing and 4% (3 businesses) indicated that they have been stable. 1% (1 business) indicated a decline in their export sales trend.

**Figure 44: Historical export sales trend**

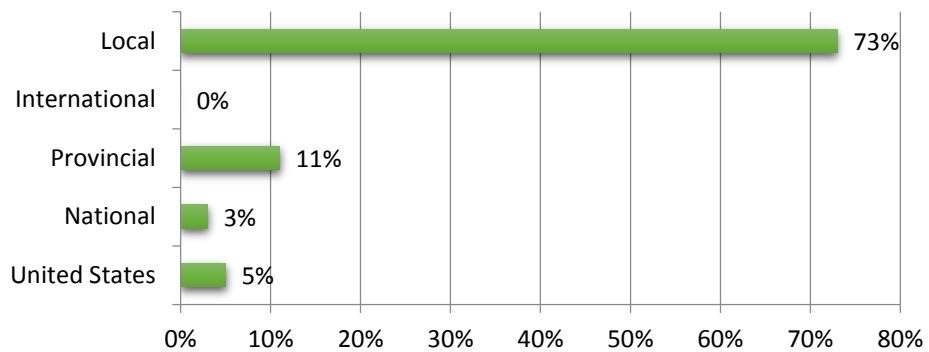


*Note: 80 respondents*

*Source of Sales*

A majority of respondents (73% or 58 respondents) indicated that over 50% of their sales are to local customers. 11% (9 respondents) indicated that over 50% of their sales are within the province. Fewer respondents (5%, 3%, 0%) indicated that the majority of their sales are to US, national or international markets, respectively.

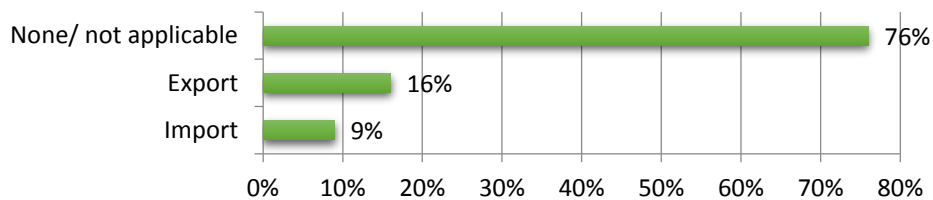
**Figure 45: Geographic source of majority of sales**



*Note: 80 respondents*

16% of respondents (13 businesses) indicated that they export goods or services to other countries and 7 respondent (9%) indicated that they import goods or services from other countries. 76% of respondents did not respond to the question, or stated they did not engage in international trade.

**Figure 46: International trade status**

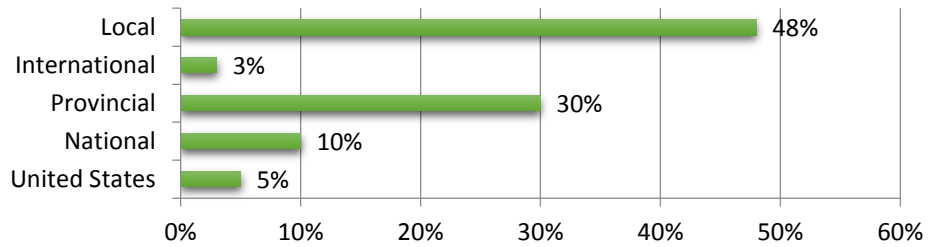


*Note: 80 respondents*

### Procurement

48% of respondents (38 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 30% (24 businesses) indicated that the majority of their supplies come from businesses located within the province.

**Figure 47: Geographic source of majority of supplies**



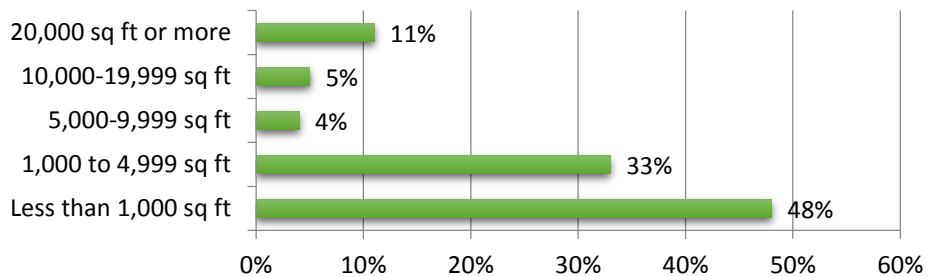
*Note: 80 respondents*

## FACILITIES AND EQUIPMENT

### Size and Condition

48% (38 businesses) of respondents reported that their facility is less than 1,000 square feet, and another 33% (26 businesses) indicated it was between 1,000 and 4,999 square feet in size.

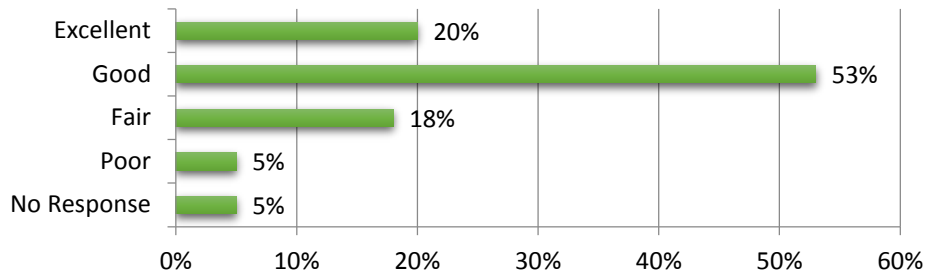
**Figure 48: Size of facility**



*Note: 80 respondents*

53% of respondents (42 businesses) indicated that their facility is in good condition. Another 20% (16 businesses) indicated that it is in excellent condition and 18% (14 businesses) reported that their facility is in fair condition. Only 5% (4 businesses) reported that their facility was in poor condition.

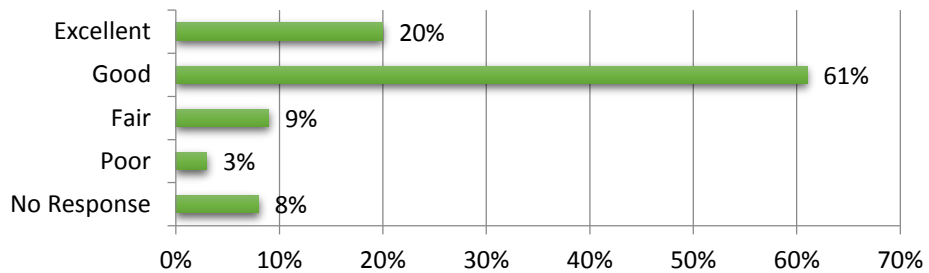
**Figure 49: Condition of facility**



*Note: 80 respondents*

61% (49 businesses) of respondents indicated that their equipment is in good condition. 20% (16 businesses) indicated that it is in excellent condition and 9% (7 businesses) report their equipment is in fair condition.

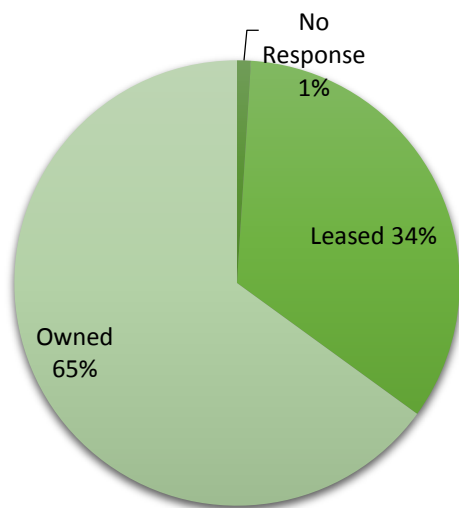
**Figure 50: Condition of equipment**



*Note: 80 respondents*

*Ownership*

**Figure 51: Ownership status of facility**

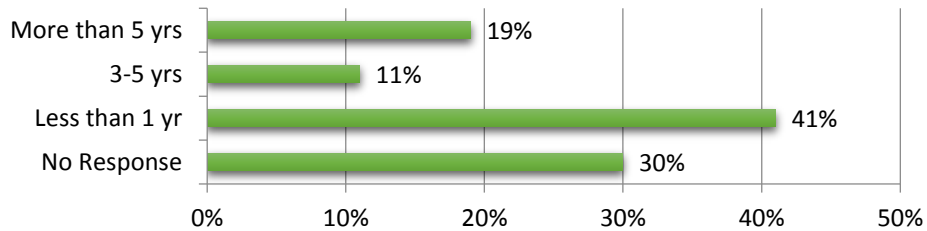


65% of respondents (52 businesses) own the facility in which they operate and 34% (27 businesses) lease it.

*Note: 80 respondents*

Of the 22 businesses that lease their facility, 41% (11 businesses) have less than a year remaining on their lease and 19% (5 businesses) have more than five years remaining. The majority of respondents that lease their facility (85% or 23 businesses) intend to renew their current lease agreement.

**Figure 52: Length of time remaining on lease**

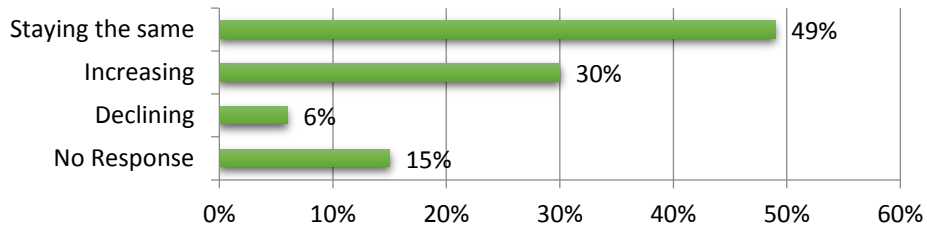


*Note: 27 respondents*

### *Investment and Expansion*

49% of respondents (39 businesses) indicated that their company's investment in their facility has stayed the same over the past 18 months, while 30% (24 businesses) indicated that the investment has increased. Only five businesses (6%) indicated that investment in their facility has decreased over the same time period.

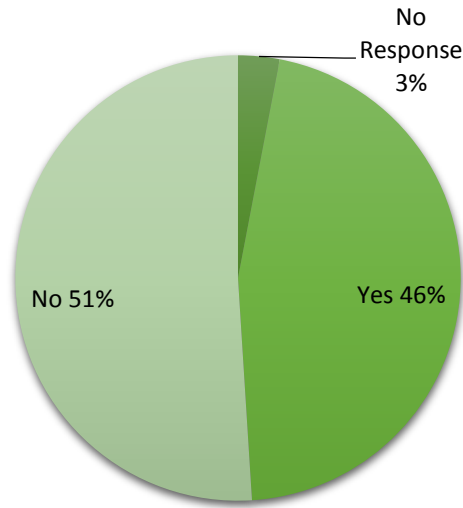
**Figure 53: Historical Investment in facility (past 18 months)**



*Note: 80 respondents*



**Figure 54: Plans to expand within three years**

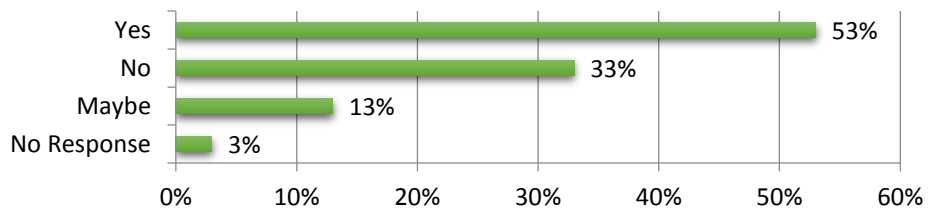


46% of respondents (37 businesses) plan to expand within three years, 51% (41 businesses) do not.

*Note: 80 respondents*

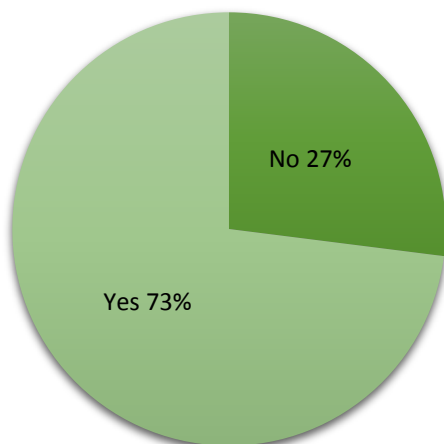
53% (42 businesses) indicated that there *was* room for expansion at their site, while 33% (26 businesses) indicated that there *was not* room at their site.

**Figure 55: Room for expansion**



*Note: 80 respondents*

**Figure 56: Adequacy of current site to support expansion**

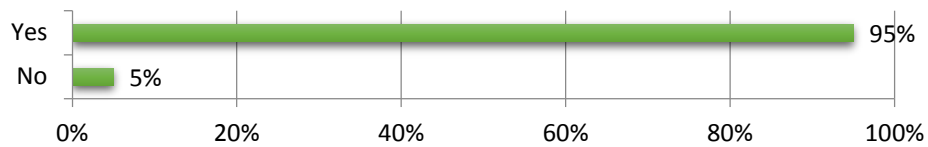


Of the 37 businesses planning expansion, 73% (27 businesses) reported that their current site will be adequate.

*Note: 37 respondents*

The vast majority of respondents (95% or 35 businesses) planning to expand indicated that expansion will occur within the community.

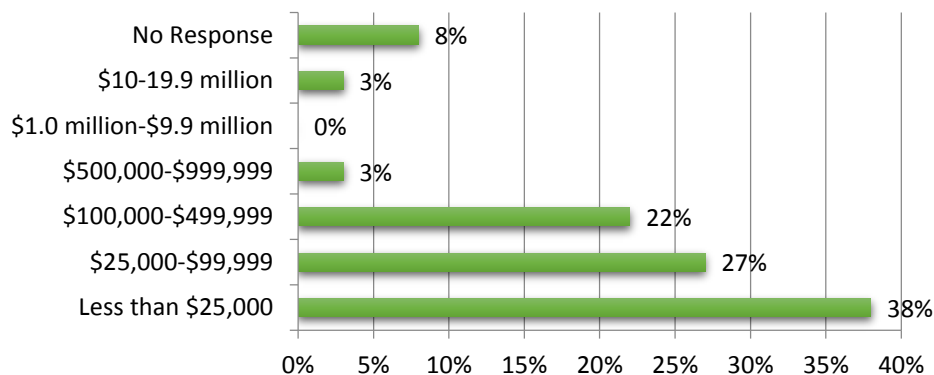
**Figure 57: Expansion to occur in community**



*Note: 37 respondents*

A substantial investment is planned for 1 business (3%), with investment in the \$10 – \$19.9 million investment planned, while an additional business is planning investments in the range of \$500,000 - \$999,999. The majority of investment reported by businesses will be more modest in the range of \$100,000 - \$499,999 (22% or 8 businesses), \$25,000 - \$99,999 (27% or 10 businesses), and less than \$25,000 (38% or 14 businesses).

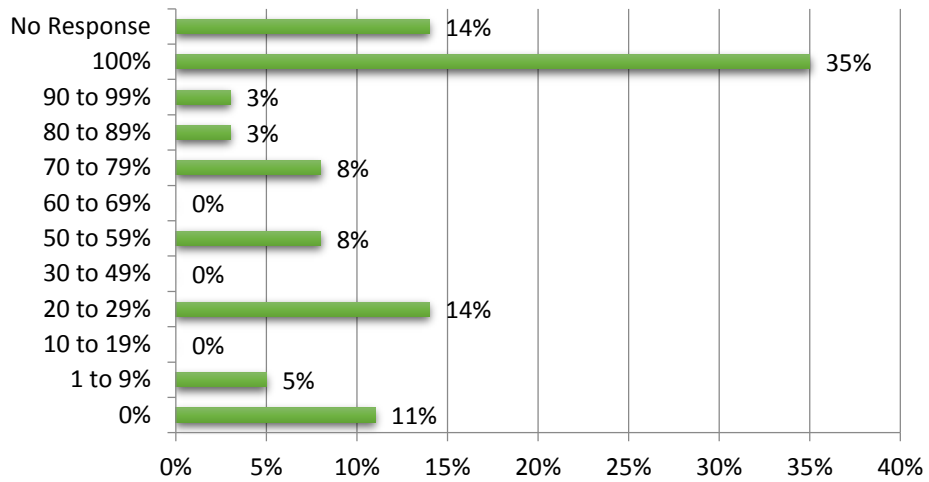
**Figure 58: Estimated expansion investment**



*Note: 37 respondents*

Of the 37 businesses planning expansion, 35% (13 respondents) anticipate devoting their entire budget to equipment and technology, while 14% (5 respondents) indicated they anticipate spending 20 – 29% of their expansion budget on equipment and technology.

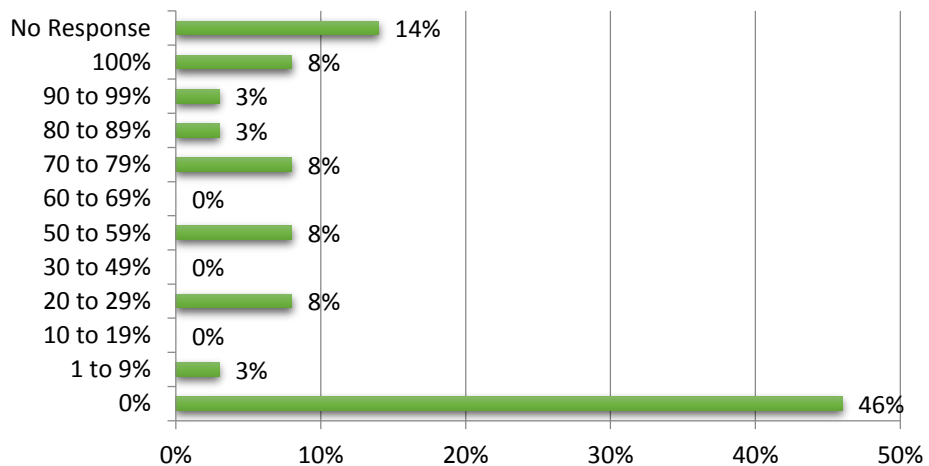
**Figure 59: Component of expansion budget for equipment and technology**



*Note: 37 respondents*

Of the 37 businesses planning to expand, 46% (17 businesses) do not expect any of their investment to be in real estate. 8% (3 businesses) anticipate spending 100% on real estate.

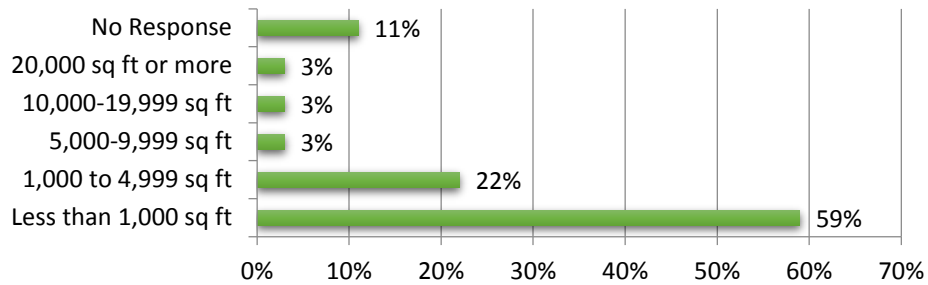
**Figure 60: Component of expansion budget for real estate**



*Note: 37 respondents*

The majority of respondents (59% or 22 respondents) indicated that they expect the size of their facility expansion will be less than 1,000 sq.ft. While 8 reported (22%) their expansion would be between 1,000 and 4,999 square feet.

**Figure 61: Size of facility expansion**

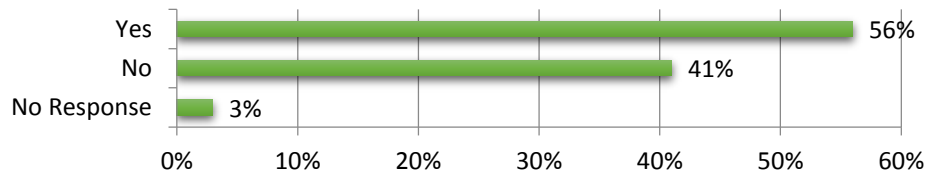


*Note: 37 respondents*

### Facility Upgrades

56% of businesses (45 businesses) indicated that there had been recent facility upgrades. Of those 16 businesses (20%) indicated that those upgrades were completed in the last 3 months.

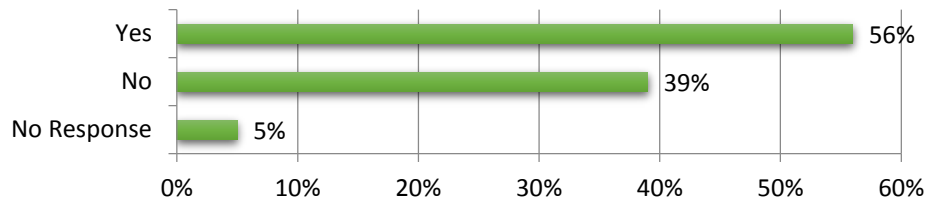
**Figure 62: Recent facility upgrades**



*Note: 80 respondents*

56% (45 businesses) indicated that they are planning facility upgrades, and that the majority (38% or 17 businesses) of those planning upgrades indicate they will occur in the next 3 months. Respondents were also asked to identify any barrier to upgrading, three respondents (10%) indicated that financing was a barrier to facility upgrades.

**Figure 63: Planning facility upgrades**

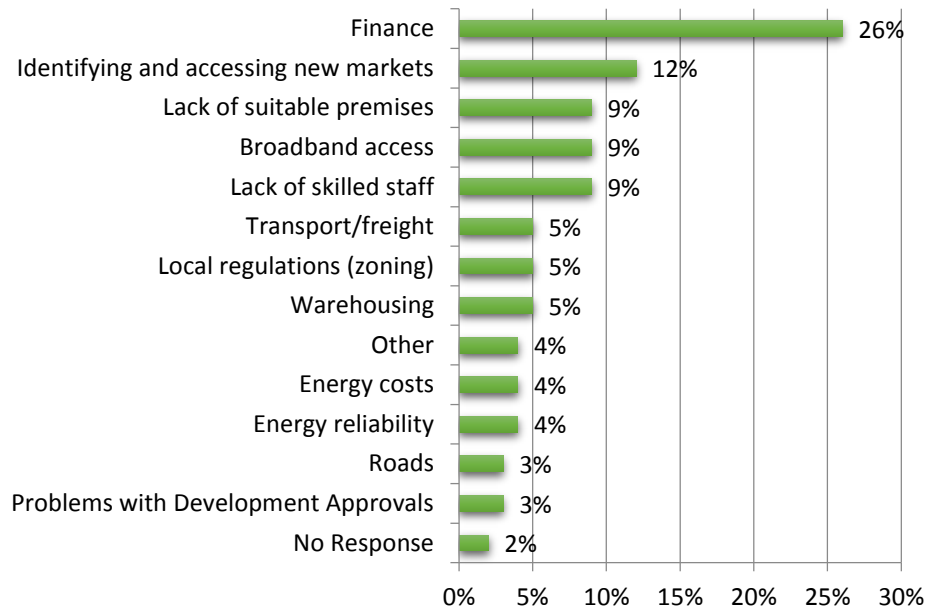


*Note: 80 respondents*

Of the 37 businesses planning an expansion, respondents cited a variety of barriers to expansion; most common was financial barriers (26% or 30 businesses), identifying and accessing new markets (12% or 14 businesses), lack of suitable premises (9% or 10 businesses), broadband access

(9% or 10 businesses), and a lack of skilled staff (9% or 10 businesses). Other responses are listed in Appendix A.

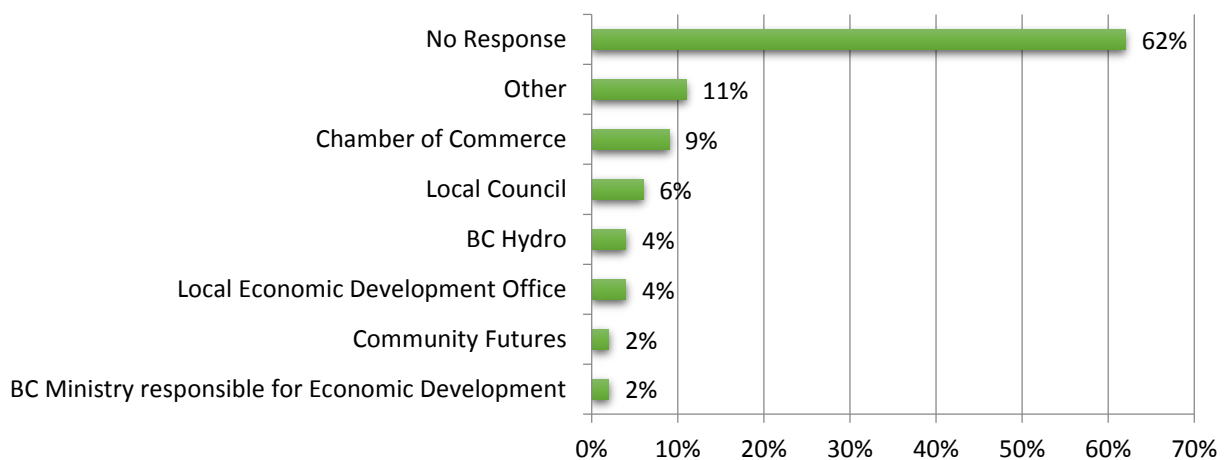
**Figure 64: Barriers to expansion**



*Note: 37 respondents*

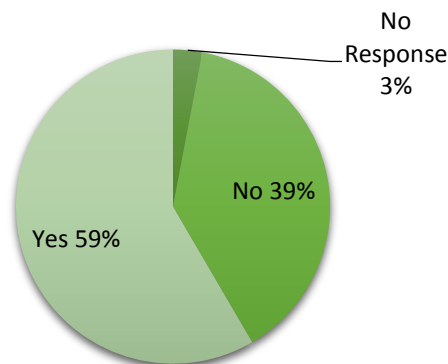
22% of respondents (8 of 37 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest number (9% or 4 businesses) had approached the Chamber of Commerce, and 6% (3 businesses) had approached the local Council. The responses included in the 'other' categories charted below are detailed in Appendix A.

**Figure 65: Organizations approached for expansion assistance**



*Note: 37 respondents*

**Figure 66: Awareness of BC Hydro Power Smart**



59% of respondents (47 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

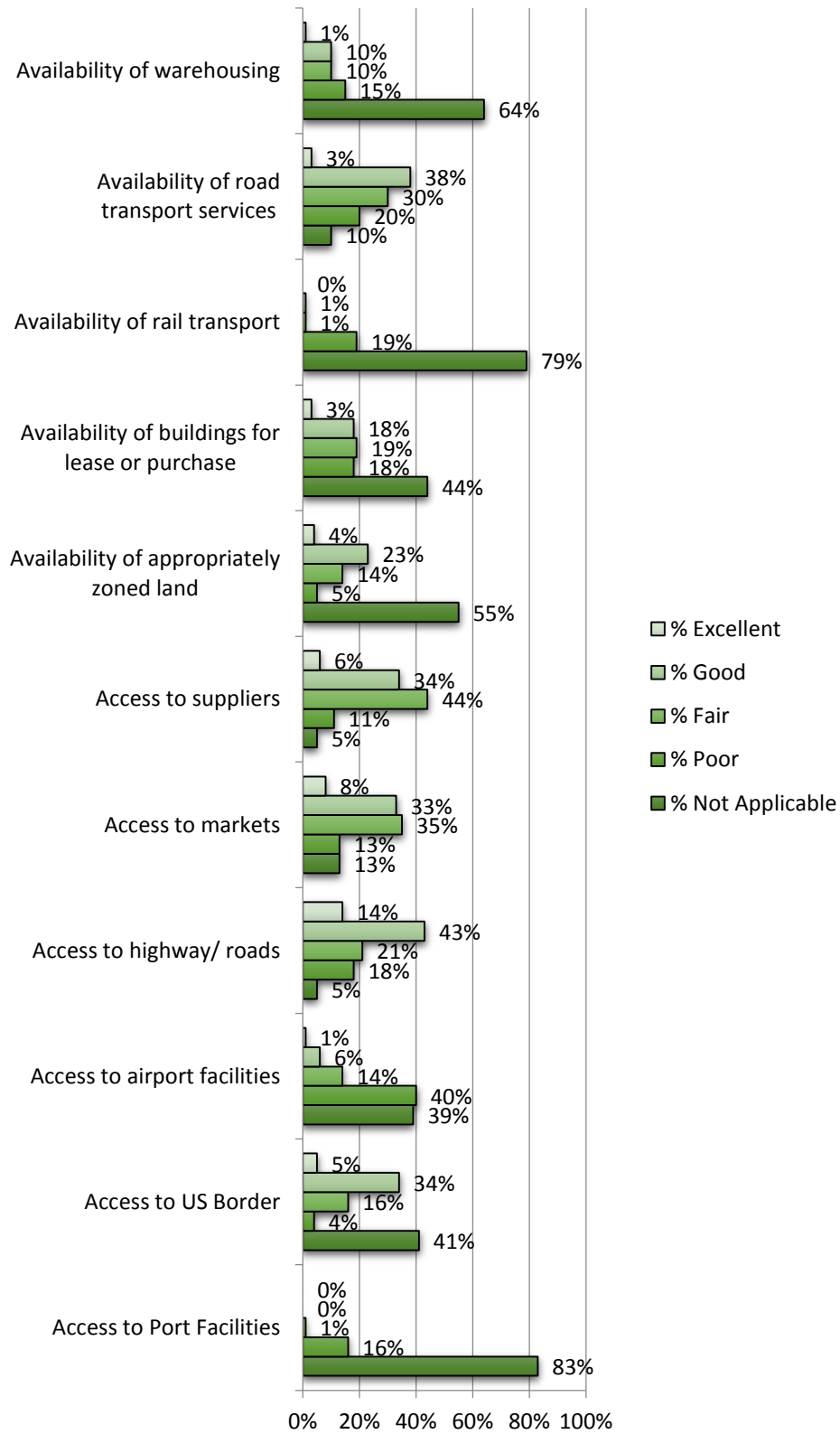
*Note: 80 respondents*

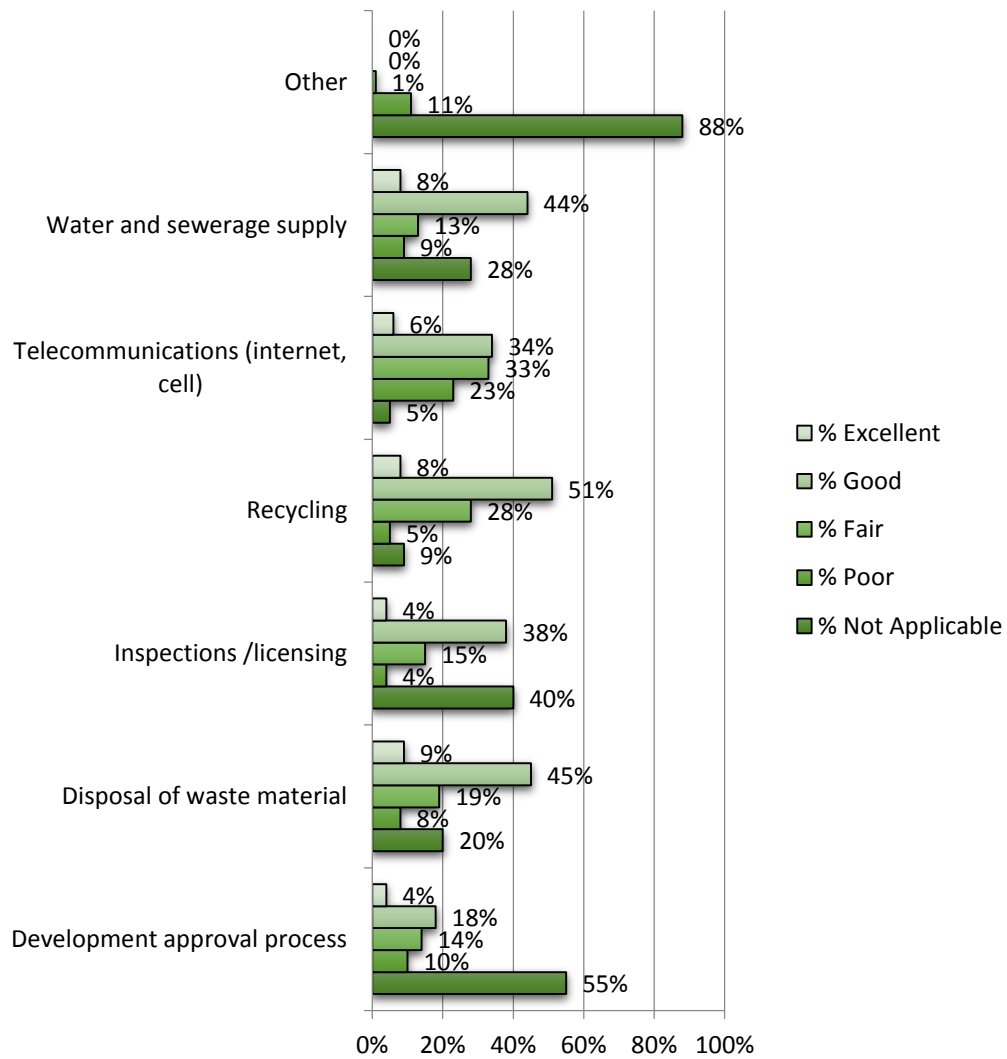
### GOVERNMENT SERVICES

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

- The services that received the highest number of **POOR** ratings were access to airport facilities (40% or 32 businesses), availability of road transport services (20% or 16 businesses), and telecommunications (23% or 18 businesses).
- The services that received the highest number of **FAIR** ratings were access to suppliers (44% or 35 businesses), access to markets (35% or 28 businesses), and telecommunications (33% or 26 businesses).
- The services that received the highest number of **GOOD** ratings were recycling (51% or 41 businesses), disposal of waste materials (45% or 36 businesses) and water and sewerage supply (44% or 35 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to highways/roads (14% or 11 businesses), disposal of waste material (9% or 7 businesses). The following were all rated excellent by 8% or 6 businesses: water and sewerage supply, recycling, and access to markets.
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (83% or 66 businesses), availability of rail transport (79% or 63 businesses) and the availability of warehousing (64% or 51 businesses).

**Figure 67: Rating of government services**





*Note: 80 respondents*

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 73% respondents (58 businesses) indicated they had suggestions. The highest number of responses (24% or 20 businesses) discussed improvements to internet service. Road maintenance was also referenced by 18% (15 businesses) of respondents. Improvements to cellular service was referenced by 13% of respondents (11 businesses).



**Figure 68: Key words and responses in respondents' suggestions for improvements to government services**



*“I need refrigerated courier transportation to transport meat from the Slocan Valley. I'd like to be able to access more local meats.”*

*“Improve roads and internet speed.”*

*“Provide cell service.”*

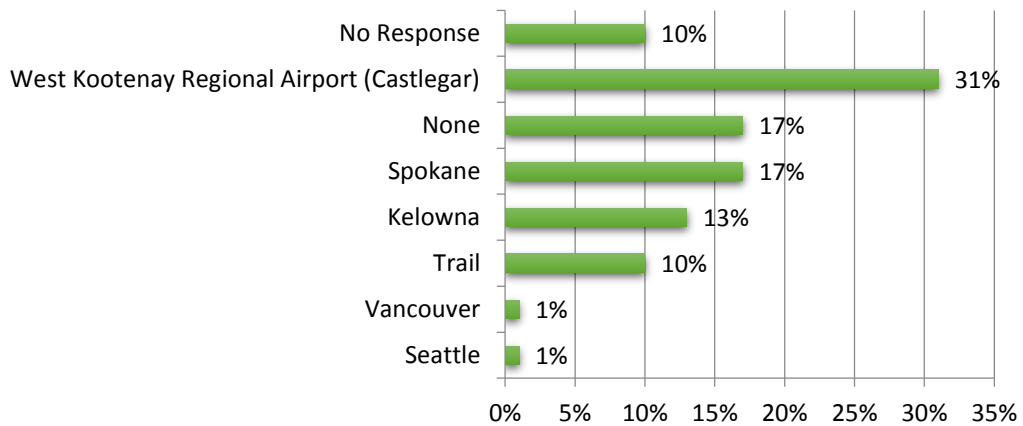
*“Love to see a bus route in this community - Daily to Nelson Minimum is a MUST.”*

*“Cell service would be nice up the lake or anywhere outside of Kaslo.”*

**Airport Service**

The West Kootenay Regional Airport (Castlegar) is the most used airport, with 31% of respondents (34 businesses) indicating they use that airport. The Spokane International Airport was the second most used with 17% (19 businesses), and the same percentage of respondents indicated that they do not use an airport service (17% or 18 businesses).

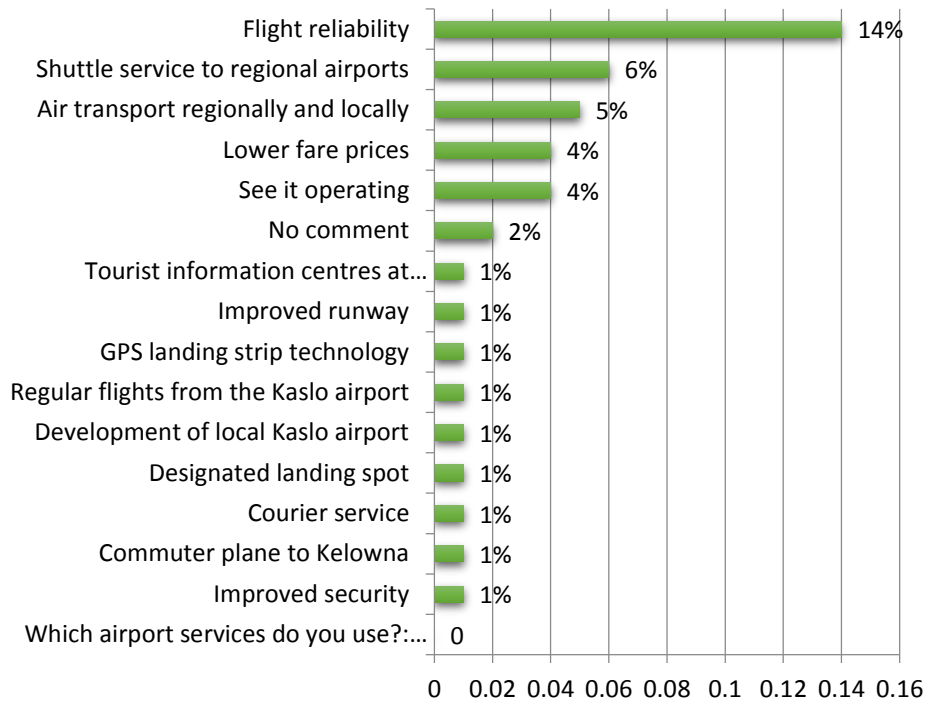
**Figure 69: Airport service used**



*Note: 80 respondents*

Respondents indicated that they would most like to see improved flight reliability (14% or 12 businesses) and shuttle service to regional airports (6% or 5 businesses). Other responses included regional and local air transport (5% or 4 businesses), lower fare prices (4% or 3 businesses), and a desire to see it operating (4% or 3 businesses), which could refer to the Kaslo aerodrome.

**Figure 70: New services at local airport**



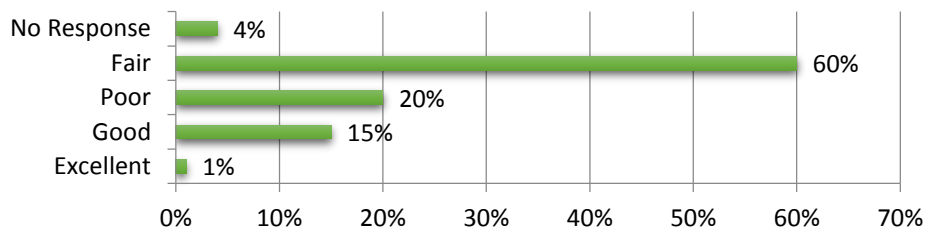
*Note: 80 respondents*

## BUSINESS CLIMATE

### Quality of Business Climate

The majority of responses rated the overall business climate as fair (60% or 48 businesses).

**Figure 71: Rating of local business climate**



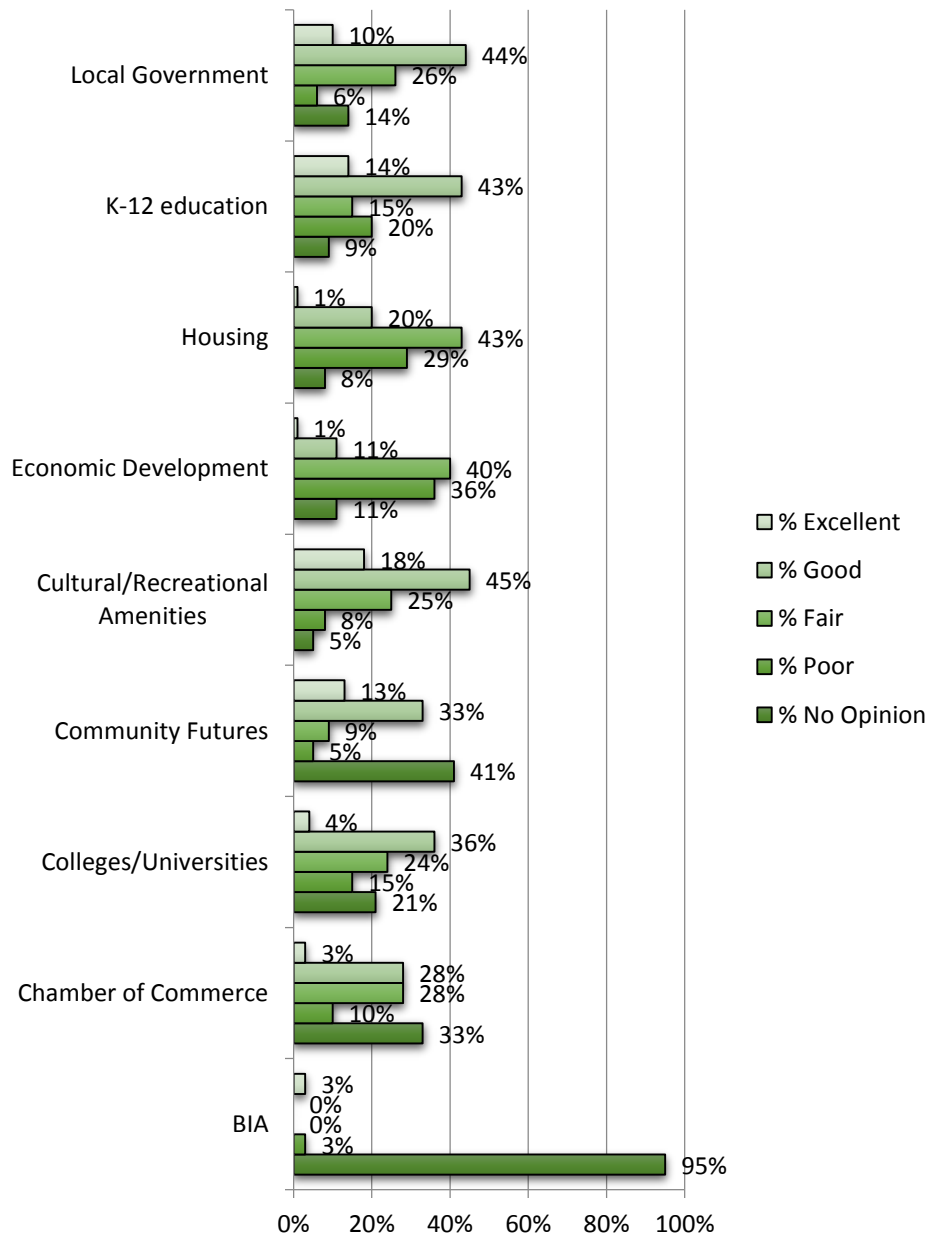
*Note: 80 respondents*

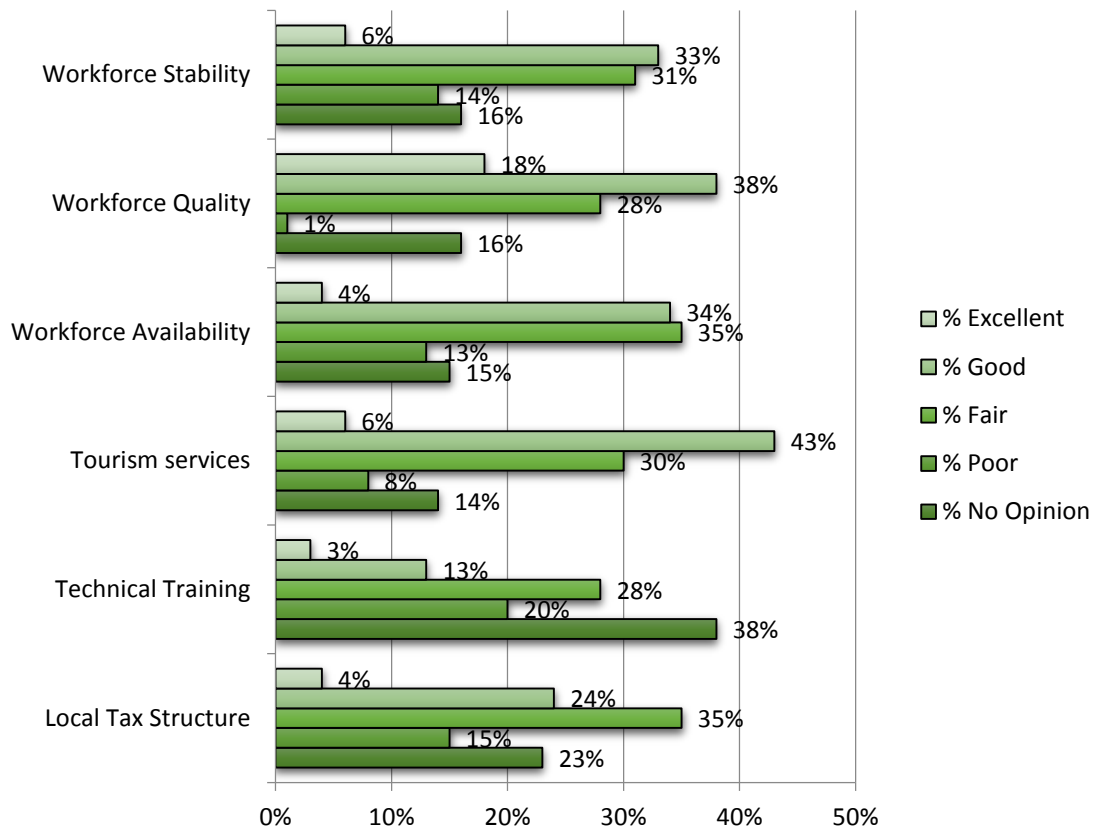
80 Respondents rated the quality of a list of specific business climate factors as either poor, fair, good, excellent or no opinion to their business.

- The factors that received the highest number of **POOR** ratings included economic development (36% or 29 businesses) and housing (29% or 23 businesses).
- The factors that received the highest number of **FAIR** ratings included housing (43% or 34 businesses) and the economic development (40% or 32 businesses).

- The factors that received the highest number of **GOOD** ratings included cultural and recreational amenities (45% or 36 businesses) and local government (44% or 35 businesses)
- The factors that received the highest number of **EXCELLENT** ratings included cultural and recreational amenities (18% or 14 businesses) and workforce quality (18% or 14 businesses).
- The factors that received the highest number of **NO OPINION** ratings include the Business Improvement Association (BIA) (95% or 76 businesses), and Community Futures (41% or 33 businesses).

**Figure 72: Rating of business climate factors**

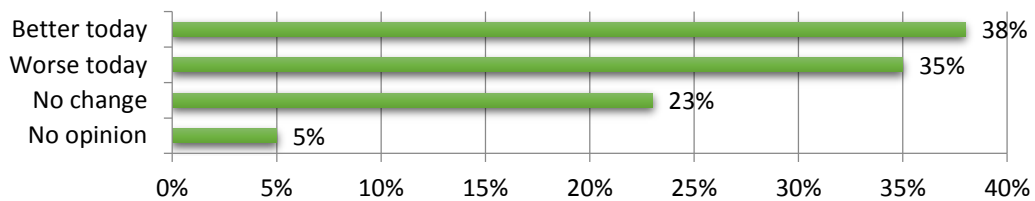




Note: 80 respondents

38% of respondents (30 businesses) felt that the business climate is better today than it was 5 years ago, however, and almost equal number felt that it is worse today (35% or 28 businesses).

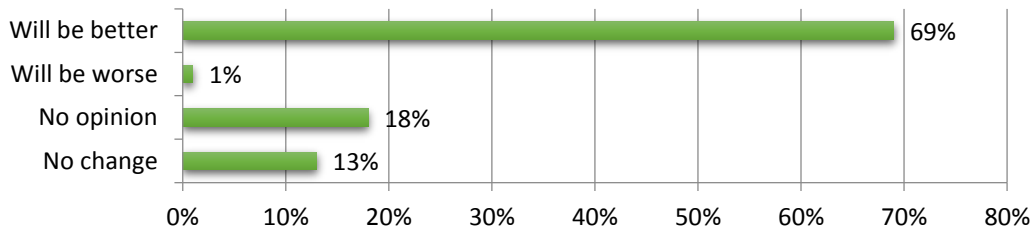
Figure 73: Business climate today vs. 5 years ago



Note: 80 respondents

69% of respondents (55 businesses) expect that the business climate will be better 5 years from today. 1% (1 businesses) expect that it will be worse.

**Figure 74: Business climate 5 years from today**

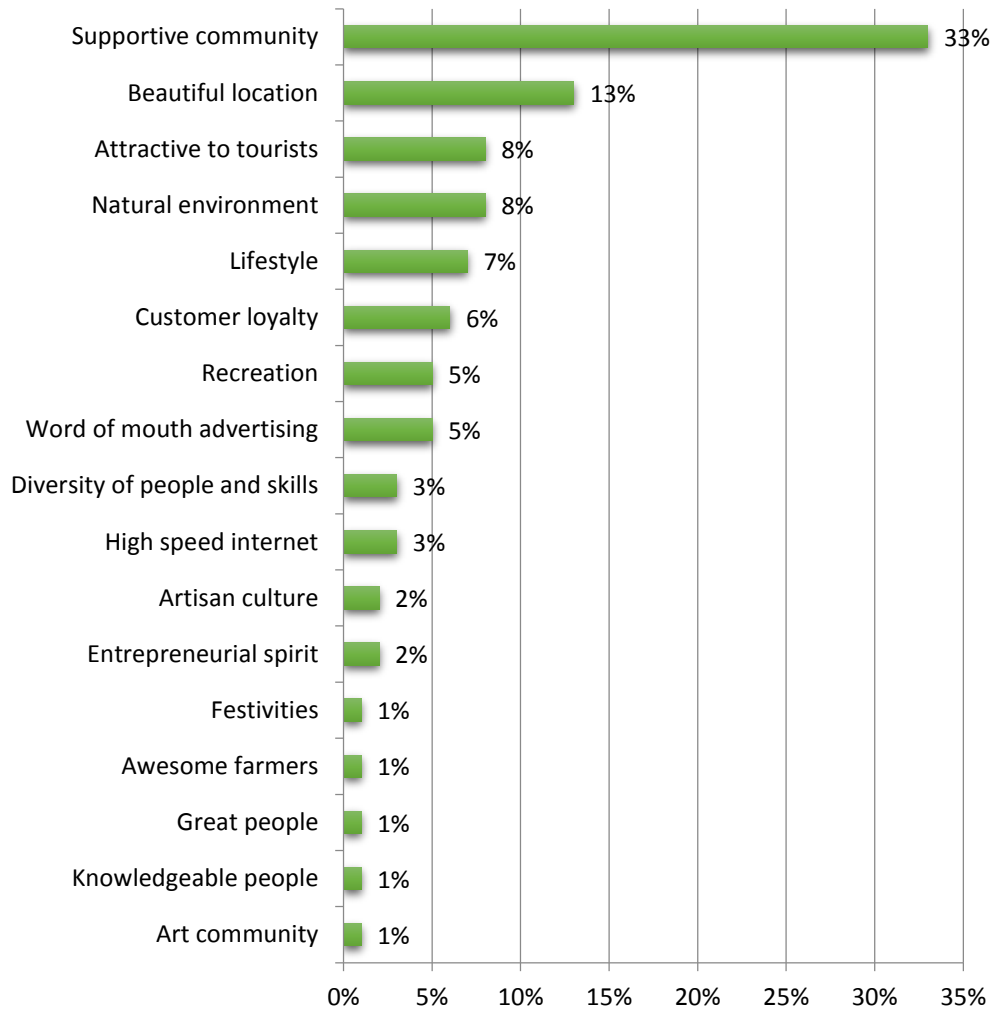


*Note: 80 respondents*

*Strengths and Weaknesses of Business Climate*

88 responses were provided when 80 respondents were asked to list the community's strengths as a place to do business, the highest number of responses (33% or 29 responses) cited the supportive nature of the community as the community's strength. 13% (11 businesses) indicated the beautiful location, and natural environment and attractiveness to tourists were both cited by (8% or 7 businesses, respectively).

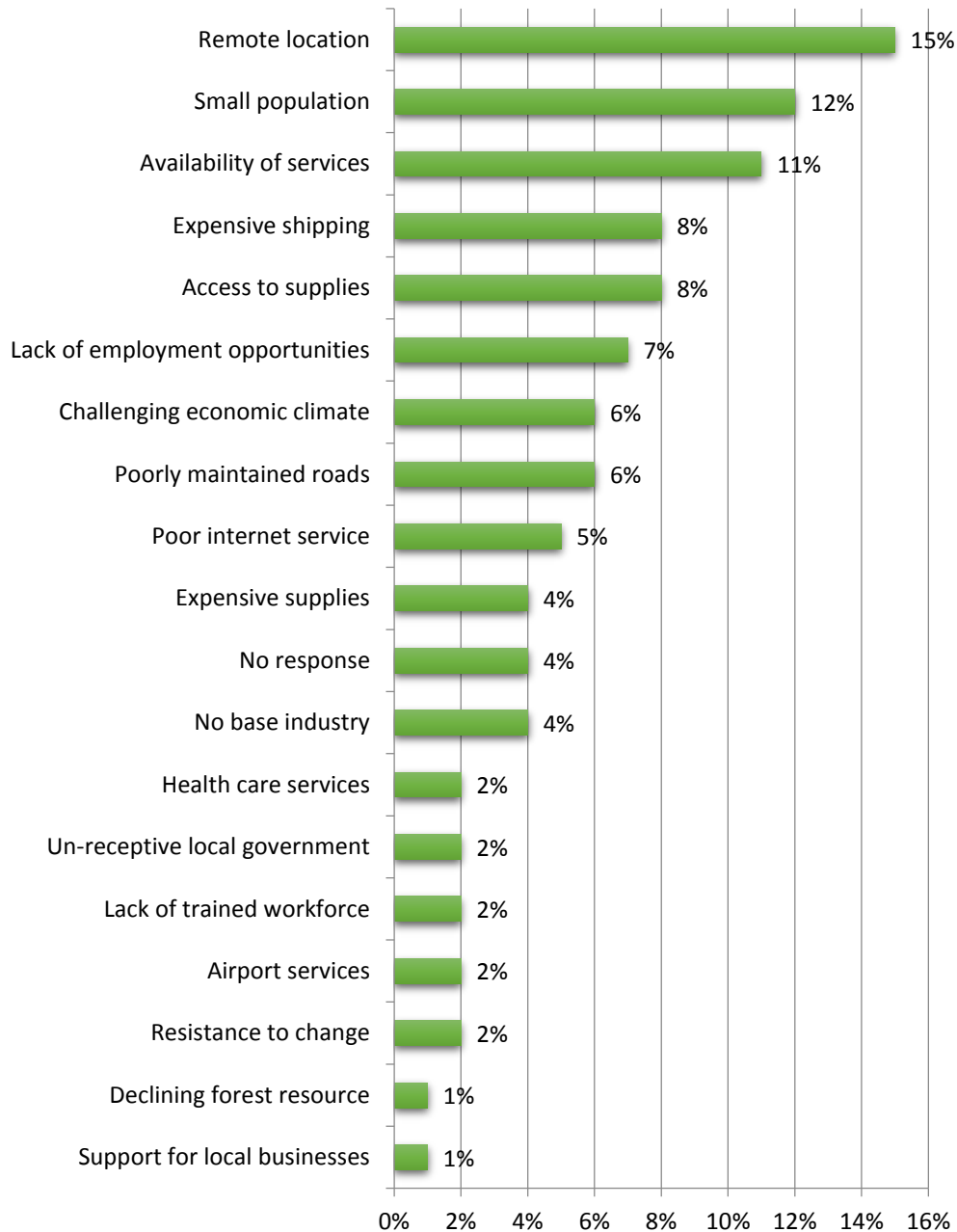
**Figure 75: Community's strengths as a place to do business**



*Note: 80 respondents*

102 responses were provided when respondents were asked to list the community's weaknesses as a place to do business, the highest number of responses (15% or 15 respondents) was received for the remote location. The small population (12% or 12 respondents) and the availability of services (11% or 11 respondents) were also cited.

**Figure 76: Community's weaknesses as a place to do business**

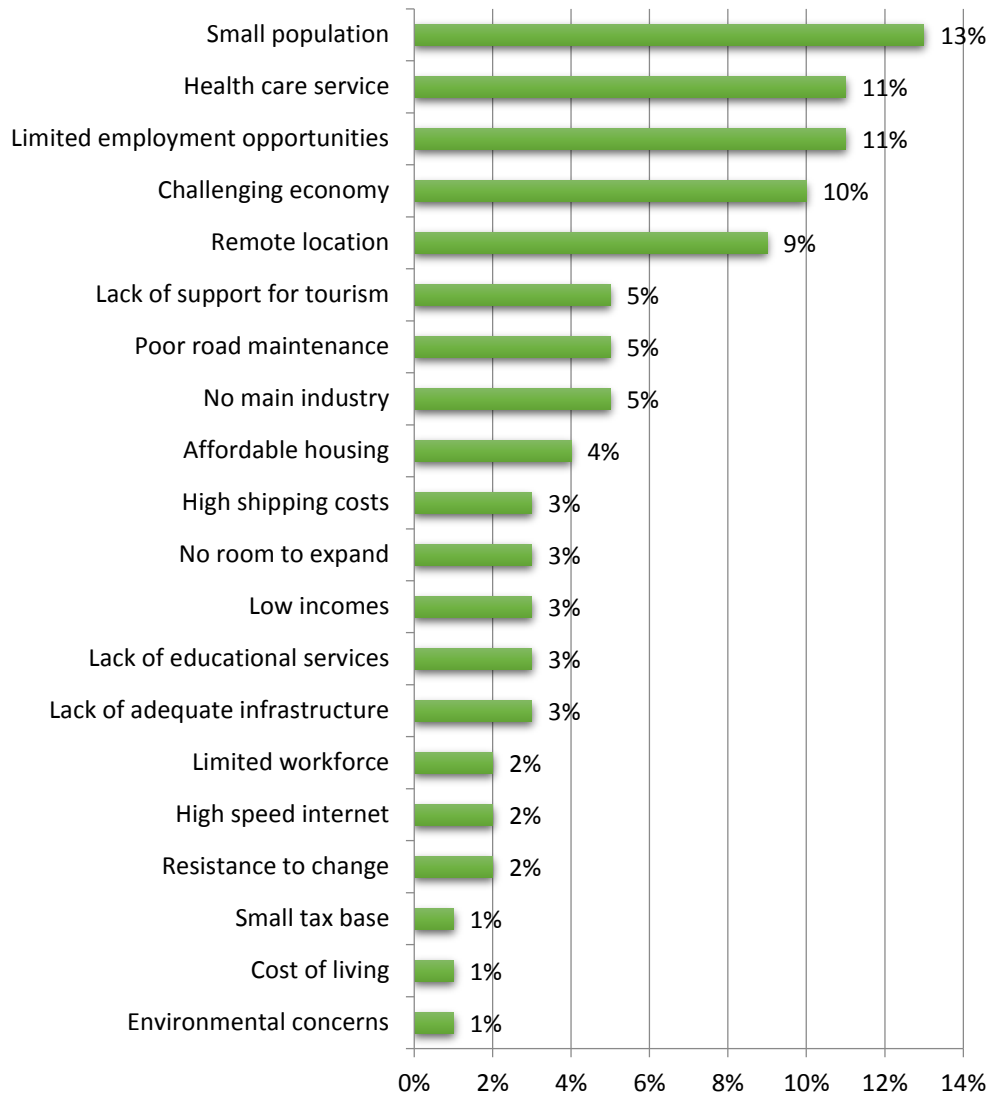


*Note: 80 respondents*

**Business Growth**

75% of respondents (60 businesses) indicated that there are barriers to growth. The highest number of respondents (13% or 12 businesses) stated that the small population size is an important barrier to growing the community's economy. Other commonly cited barriers include health care service and limited employment opportunities (11% or 10 businesses).

**Figure 77: Barriers to growth in the community**



*Note: 60 respondents*

The following excerpts illustrate the barriers cited:

*“The remoteness and low population. There is a cap to how much I can sell here.”*

*“Hard to retain employees and keep them long term because the youth move on to other employment.”*

*“Low population and lack of primary industry.”*

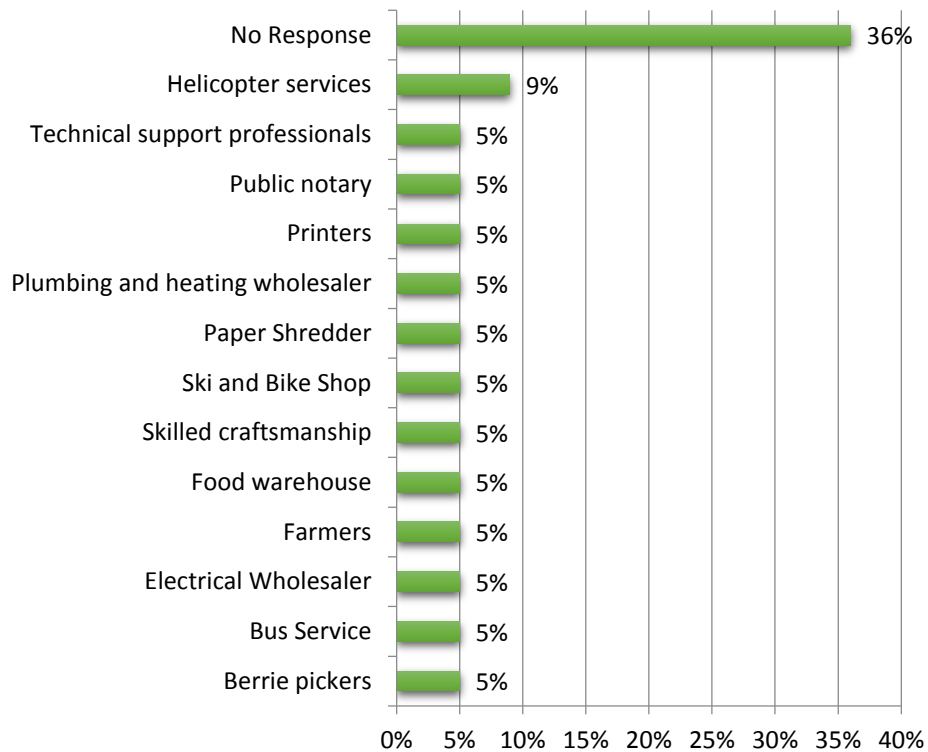
*“Investment Dollars are going down - Not a sustainable Economic Business Climate.”*

*“The lack of 24/7 health care.”*



71% of respondents (57 respondents) indicated that there were *not* suppliers that could locate in the region, with only 28% (22 businesses) indicating that there were. Helicopter services (9% or 2 businesses) and technical support professionals (5% or 1 business ) were the most commonly cited.

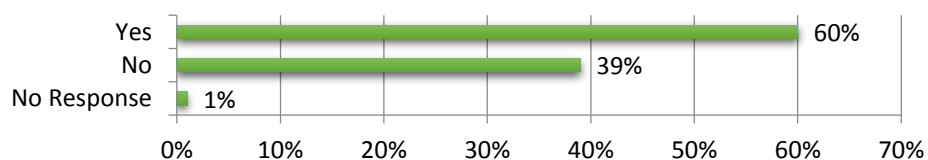
**Figure 78: Potential Suppliers**



*Note: 22 respondents*

60% of respondents (48 businesses) indicated that they do supply products or services to companies located in the community or region.

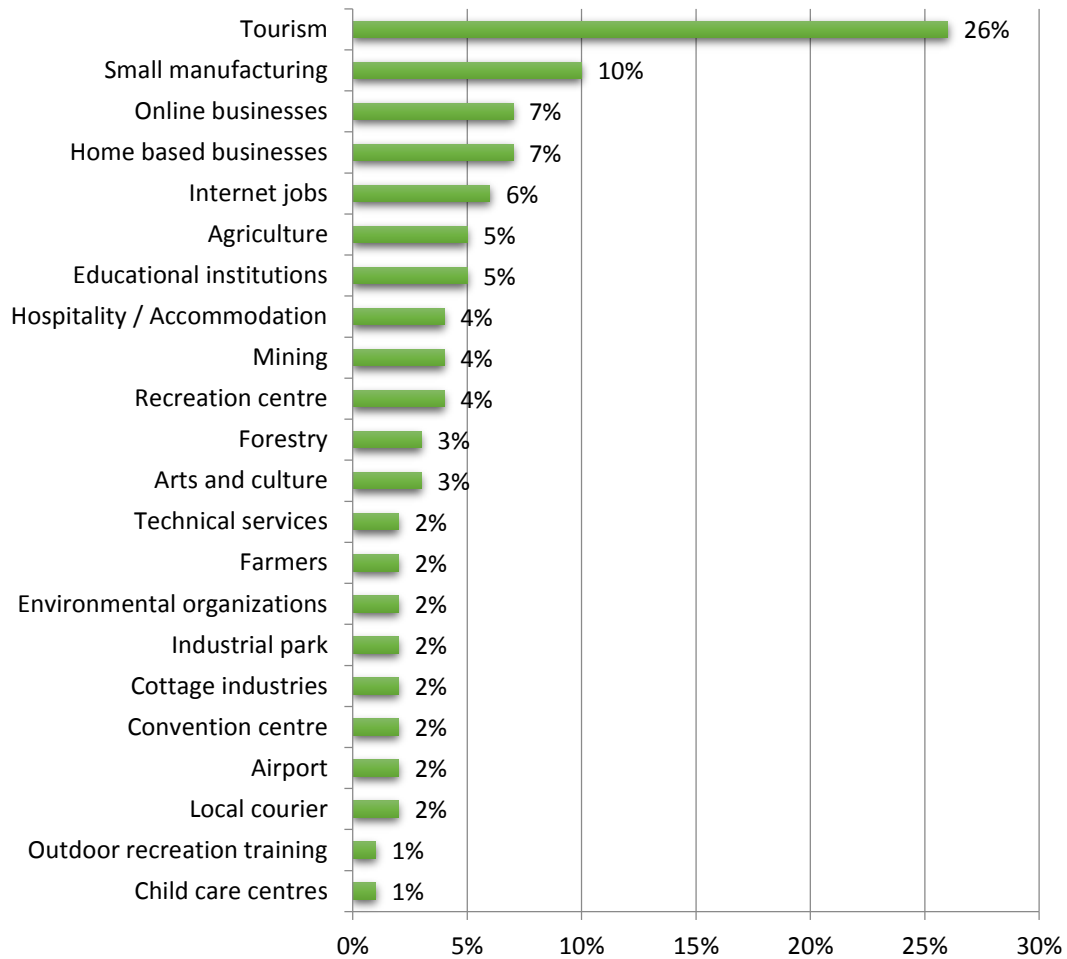
**Figure 79: Supply to local companies**



*Note: 80 respondents*

91% of respondents (73 businesses) indicated that there are sectors, businesses or industries that could be attracted to the region. Tourism was the most frequently cited (26% or 32 respondents), with small manufacturing (10% or 12 businesses), online businesses (7% or 9 businesses) and home based businesses (7% or 9 businesses) being commonly cited.

**Figure 80: Sectors, businesses or industries that could be attracted to region**



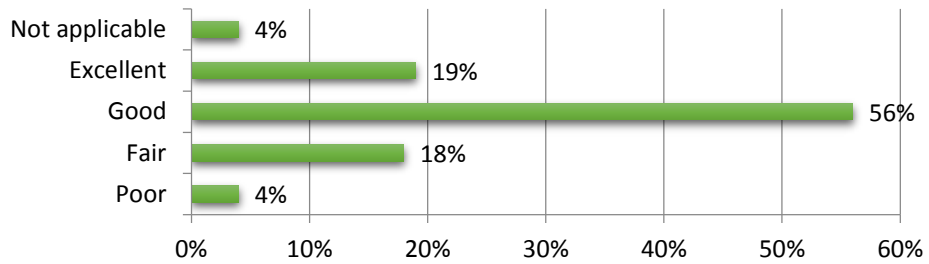
*Note: 73 respondents*

## ASSESSMENT AND PLANS

### *Overall Health*

The majority of businesses surveyed reported that their facility is in overall good health (56% or 45 businesses), 19% (15 businesses) reported that their company's health is excellent, 18% (14 businesses) reported that it is fair, and 4% (3 businesses) indicated their company's health was poor.

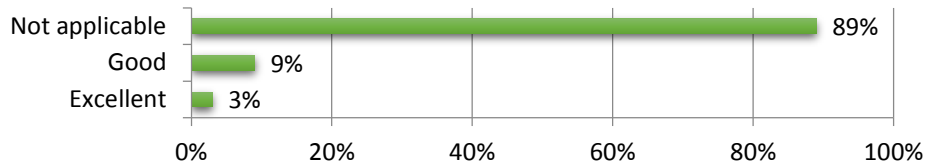
**Figure 81: Facility's overall health**



*Note: 80 respondents*

Most businesses with a parent company indicated that the health of that parent company is either good (9% or 7 businesses) or excellent (3% or 2 businesses).

**Figure 82: Overall health of parent company**

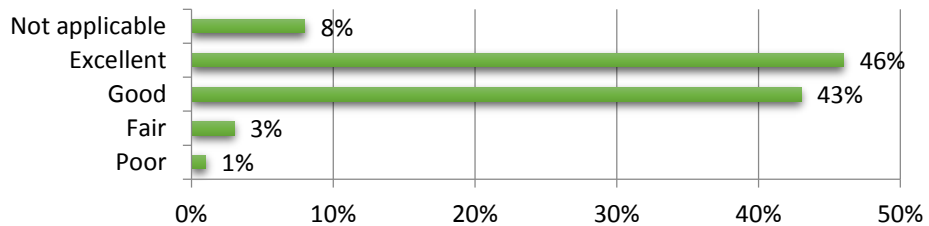


*Note: 80 respondents*

*Attitude toward Community*

46% of respondents (37 businesses) indicated that their local management's attitude toward the community is excellent and 43% (34 businesses) indicated that it is good.

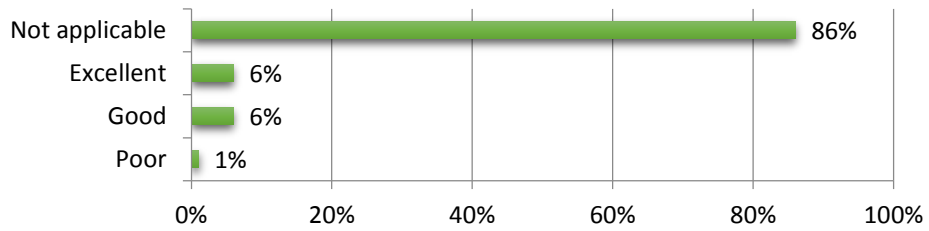
**Figure 83: Local management's attitude toward community**



*Note: 80 respondents*

The highest number of respondents (6% or 5 businesses) indicated that their parent company's attitude toward the local community is excellent or good.

**Figure 84: Parent company's attitude toward local community**

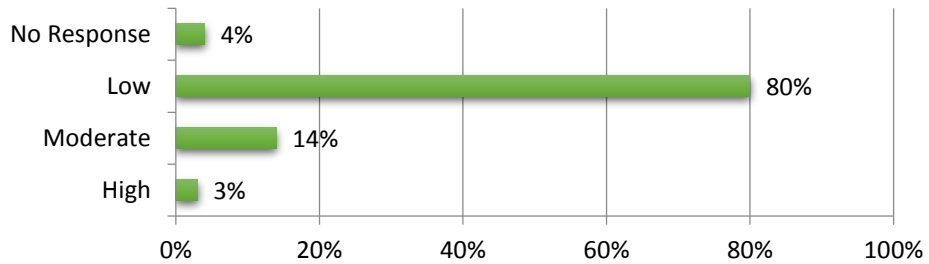


*Note: 80 respondents*

*Risk of Closing or Downsizing*

Data indicates that the risk of Kaslo businesses closing or downsizing is low. Only 3% (2 businesses) of respondents reported that they are at a high risk of closing or downsizing in the next 1-3 years.

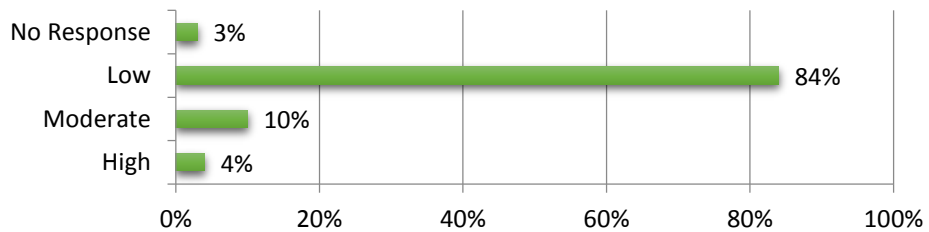
**Figure 85: Risk of facility closing**



*Note: 80 respondents*

Similarly, the data indicates that the risk of downsizing is low, with only 4% (3 businesses) indicating that risk is high.

**Figure 86: Risk of facility downsizing**



*Note: 80 respondents*

## RECOMMENDATIONS

### NEXT STEPS

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

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

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

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

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

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

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

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

## POTENTIAL ACTION AREAS

### *Small, locally owned businesses*

The following data indicates that the predominant business typology is small, independently owned businesses: 86% of businesses surveyed indicate they do not have another location, nor a parent company, the majority of businesses employ less than five employees, and 31% cite annual sales under \$100,000. Actions to support and encourage small businesses would be most appropriate for this target market and could include specific training targeted to the needs of small businesses, providing shared services to small businesses such as payroll, human resources, employee recruitment, bookkeeping, etc.. Additional actions could include exploring existing supports available from the provincial Small Business BC organisation or CBT's Basin Business Advisors Program.

### *Youth Employment*

Findings indicate that employees under the age of 26 are in the minority, making up just 3% of the essential workforce. Increasing youth involvement in the local workforce could be encouraged. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions. This may assist in addressing the recruitment challenges that 28% of businesses report having.

### *Business Growth & Expansion*

44% of businesses in the area report being in a growth cycle, and 51% indicate that they are planning to expand within the next three years. The majority of those businesses planning to expand indicate their existing site is adequate, and the vast majority of expansion plans are expected to occur within the community. Businesses also report that employment rates are stable, with little change anticipated. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of connecting businesses with resources to assist in expansion projects, such as CBT's Basin Business Advisors Program. It is worth noting that only 22% of businesses with expansion plans sought assistance from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions. These potential actions and any others should be designed to address the stated barriers to expansion which include financing and identifying and accessing new markets.

### *Training*

Businesses identified a need for training in the areas of bookkeeping and computer related training such as web development and social media usage. Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 45% of businesses do have a training budget, and that they have a preference for individual coaching sessions (36%), classroom setting (32%), or online/webinar (25%) style formats. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in local

programming. Awareness of the training opportunities currently available could also be promoted within the Kaslo business community.

### *Succession and Business Planning*

Business and succession planning are critical to the health and longevity of businesses, yet only 14% of respondents indicated that they have a formal succession plan and 34% have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

### *Economic Stability & Diversification*

A small population base and remote location were cited most frequently by local businesses as the greatest weaknesses and its greatest barrier to growth. While there is substantial support for local procurement, with 48% (38 businesses) indicating they purchase a majority of their supplies from local sources, increasing the support for existing businesses could improve business stability and address the challenges that a small population base and remote location face. Actions could also include supporting businesses to expand to virtual markets made available through improved broadband access in Kaslo. Tourism was also the most frequently cited sector that could be attracted to the region. Actions to increase the tourism industry could include continued collaboration between government and local tourism agencies such as Nelson Kootenay Lake Tourism, the Chamber of Commerce, and local businesses. With most businesses expressing optimism for an improved business climate over the next five years, and the supportive nature of the community as its greatest strength, there is much positive support and social capital to build on the work already occurring in this area.

### *Government Services*

A recurring theme related to government services was the need for improved telecommunications/internet service as well as concerns with the health care services available. Actions related to telecommunications/internet service could include promoting the newly implemented fibre optic service in Kaslo, as well as facilitating a stakeholder meeting to explore concerns and consider how improvements can be achieved with groups such as the Kootenay Association for Science and Technology, the Kaslo infoNet Society (KiN), and the Columbia Basin Broadband Corporation. The lack of 24/7 health care services/emergency health care services was frequently cited as a barrier to growth in the community, and was also referenced by seven respondents when considering what government services were poor or fair. Actions related to the provision of health care services could include establishing a task force to, explore related strategic planning and actions undertaken by other communities in the region and possible applied research linkages to Selkirk College's nursing faculty.

### *NGO Sector*

Kaslo hosts a number of Non-Governmental Organizations (NGOs). This sector is an important component of the social fabric and a solid determinant of economic well-being for the area. The NGO sector could benefit from: management and technical training support, assistance in securing funding, suitable lands for expansion and broadband access. The NGO sector's largest concerns with public infrastructure relate to: airport access, transportation and logistics, and providing public restrooms.



## APPENDIX A: DATA TABLES

### COMPANY INFORMATION

| <b>Figure 1: Industry Classification</b>                 | <b>NAICS Code</b> | <b>Count</b> | <b>Percent</b> |
|--|-------------------|--------------|----------------|
| Administrative Support, Waste Management and Remediation | 56                | 1            | 1%             |
| Real Estate and Rental and Leasing                       | 53                | 1            | 1%             |
| Finance and Insurance                                    | 52                | 1            | 1%             |
| Educational Services                                     | 61                | 1            | 1%             |
| Information and Cultural Industries                      | 51                | 2            | 3%             |
| Health Care and Social Assistance                        | 62                | 4            | 5%             |
| Agriculture, forestry, fishing and hunting               | 11                | 5            | 6%             |
| Professional, Scientific and Technical Services          | 54                | 5            | 6%             |
| Arts, Entertainment and Recreation                       | 71                | 6            | 8%             |
| Accommodation and Food Services                          | 72                | 8            | 10%            |
| Construction   | 23                | 8            | 10%            |
| Manufacturing  | 31-33             | 9            | 11%            |
| Other Services   | 81                | 14           | 18%            |
| Retail and Wholesale Trade                               | 41-45             | 15           | 19%            |
| Total  |                   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 2: Facility function(s)</b> | <b>Count</b> | <b>Percent</b> |
|---------------------------------------|--------------|----------------|
| No Response                           | 1            | 1%             |
| Engineering/RD                        | 5            | 3%             |
| Distribution                          | 20           | 10%            |
| Manufacturing                         | 24           | 12%            |
| Warehousing                           | 29           | 15%            |
| Services                              | 57           | 29%            |
| Headquarters                          | 58           | 30%            |
| Total                                 | 194          | 100%           |

Survey Respondents: 80

| <b>Figure 3: Location of primary competitors</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No response                                      | 8            | 8%             |
| National   | 5            | 5%             |

|                  |    |      |
|------------------|----|------|
| Provincial       | 9  | 9%   |
| International    | 12 | 12%  |
| Local / regional | 63 | 65%  |
| Total            | 97 | 100% |

Survey Respondents: 80

| <b>Figure 4: Key words and responses respondents' discussions of the factors that make them successful in this region</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Advertising   | 1            | 1%             |
| Affordable land base  | 1            | 1%             |
| Online Marketing  | 1            | 1%             |
| Personal relationships  | 1            | 1%             |
| Small community   | 2            | 2%             |
| Tourism   | 2            | 2%             |
| No Response   | 2            | 2%             |
| Expertise   | 3            | 3%             |
| Access to resources   | 3            | 3%             |
| Good customers  | 4            | 4%             |
| Quality service   | 4            | 4%             |
| Good reputation   | 4            | 4%             |
| Word of mouth   | 5            | 5%             |
| Community volunteers  | 6            | 6%             |
| Local workforce   | 7            | 7%             |
| Longtime clients  | 8            | 8%             |
| Community support   | 9            | 9%             |
| Location  | 9            | 9%             |
| Demand for services provided  | 12           | 13%            |
| Quality product   | 12           | 13%            |
| Total   | 96           | 100%           |

Survey Respondents: 80

| <b>Figure 5: Why did you choose this community to locate your business?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No response   | 3            | 3%             |
| Niche market  | 2            | 2%             |
| Hobby evolved into a business   | 3            | 3%             |
| Lifestyle   | 4            | 4%             |
| Access to natural resources   | 4            | 4%             |
| Community demand/need   | 8            | 9%             |
| Already living here   | 14           | 15%            |

|                      |    |      |
|----------------------|----|------|
| Supportive community | 16 | 18%  |
| Location             | 16 | 18%  |
| Business opportunity | 21 | 23%  |
| Total                | 91 | 100% |

Survey Respondents: 80

| <b>Figure 6: Other location (Yes/No)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response                              | 3            | 4%             |
| Yes                                      | 8            | 10%            |
| No                                       | 69           | 86%            |
| Total                                    | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 7: Does this company have another location elsewhere?: If Yes, where?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 1            | 13%            |
| Outside Canada  | 1            | 13%            |
| In Province   | 6            | 75%            |
| Total   | 8            | 100%           |

Respondents with another location: 8

| <b>Figure 8: Location of headquarters</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                               | 6            | 8%             |
| Outside Canada                            | 1            | 1%             |
| In Province                               | 73           | 91%            |
| Total                                     | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 9: Life cycle stage</b> | <b>Count</b> | <b>Percent</b> |
|-----------------------------------|--------------|----------------|
| No Response                       | 2            | 3%             |
| Emerging                          | 6            | 8%             |
| Declining                         | 6            | 8%             |
| Maturing                          | 31           | 39%            |
| Growing                           | 35           | 44%            |
| Total                             | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 10: Length of time in business</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response                                  | 2            | 3%             |

|                    |    |      |
|--------------------|----|------|
| less than 1 year   | 1  | 1%   |
| 1-4 years          | 12 | 15%  |
| 5-9 years          | 16 | 20%  |
| 10-19 years        | 24 | 30%  |
| more than 20 years | 25 | 31%  |
| Total              | 80 | 100% |

Survey Respondents: 80

| <b>Figure 11: Type of business</b> | <b>Count</b> | <b>Percent</b> |
|------------------------------------|--------------|----------------|
| Limited Liability Partnership      | 1            | 1%             |
| No Response                        | 1            | 1%             |
| Other                              | 2            | 3%             |
| Partnership                        | 9            | 11%            |
| Non-Profit                         | 12           | 15%            |
| Corporation                        | 20           | 25%            |
| Sole Proprietorship                | 35           | 44%            |
| Total                              | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 12: Ownership and management changes in last 5 years</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 1%             |
| Yes  | 9            | 11%            |
| No   | 70           | 88%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 12b: Impact of Ownership or Management Change</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Neutral   | 2            | 22%            |
| Positive  | 7            | 78%            |
| Total   | 9            | 100%           |

Respondents that had an ownership change: 9

| <b>Figure 13: Pending ownership change</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response                                | 1            | 1%             |
| Yes  | 8            | 10%            |
| No   | 71           | 89%            |
| Total                                      | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 13b: Anticipated timeline for ownership change</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 3 years or more  | 1            | 13%            |
| 2 years  | 4            | 50%            |
| 1 year or less   | 3            | 38%            |
| Total  | 8            | 100%           |

Those anticipating ownership change: 8

| <b>Figure 14: Anticipated exit strategy</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Other                                       | 2            | 25%            |
| Sell to another company                     | 1            | 13%            |
| Sell/transfer to a non-family member        | 5            | 63%            |
| Total                                       | 8            | 100%           |

Those anticipating ownership change: 8

| <b>Figure 15: Is there a formal succession plan?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Not applicable                                       | 3            | 4%             |
| Yes  | 11           | 14%            |
| No   | 66           | 83%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 15b: Successor Identified</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Yes                                     | 1            | 13%            |
| No                                      | 7            | 88%            |
| Total                                   | 8            | 100%           |

Those anticipating ownership change: 8

| <b>Figure 15c: If Yes, have you been assisted in preparation of a succession plan?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 2            | 18%            |
| Yes  | 4            | 36%            |
| No   | 5            | 45%            |
| Total  | 11           | 100%           |

Survey Respondents answering Yes to "Is there a formal succession plan?" : 11

| <b>Figure 15d: If Yes, by whom</b> | <b>Count</b> | <b>Percent</b> |
|------------------------------------|--------------|----------------|
| Spouse                             | 1            | 25%            |
| Other                              | 3            | 75%            |
| Total                              | 4            | 100%           |

Survey Respondents answering Yes to "If Yes, have you been assisted in preparation of a succession plan?" : 4

| <b>Figure 15e: If Yes, by whom: If other, please explain</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| CBT  | 1            | 20%            |
| Lawyer   | 1            | 20%            |
| Local government   | 1            | 20%            |
| No Response  | 1            | 20%            |
| Accountant   | 1            | 20%            |
| Total  | 5            | 100%           |

Survey Respondents answering "Other" to "If Yes, by whom" : 3

| <b>Figure 16: Existence of current business plan</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 5            | 6%             |
| Yes  | 27           | 34%            |
| No   | 48           | 60%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

## LOCAL WORKFORCE

| <b>Figure 17: Total number of employees</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 20-49                                       | 7            | 9%             |
| 10-19                                       | 18           | 23%            |
| Less than 5                                 | 55           | 69%            |
| Total                                       | 80           | 100%           |

Survey Respondents: 80

Total Employees: 478

| <b>Figure 18: Nature of Employment</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Part Time                              | 176          | 37%            |
| Temporary                              | 112          | 23%            |
| Full Time                              | 190          | 40%            |
| Total                                  | 478          | 100%           |

Survey Respondents: 80

| <b>Figure 18b: Number of Full-Time Employees</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 20-49  | 1            | 1%             |
| 10-19  | 9            | 11%            |
| Less than 5                                      | 70           | 88%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 18c: Number of Part-Time Employees</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 20-49  | 1            | 1%             |
| 10-19  | 8            | 10%            |
| Less than 5                                      | 71           | 89%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 18d: Number of Temporary Employees</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 10-19  | 8            | 10%            |
| Less than 5                                      | 72           | 90%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 19: Employment trend over last 10 years</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 3            | 4%             |
| Decreased   | 10           | 13%            |
| Increased   | 24           | 30%            |
| Stayed the Same                                       | 43           | 54%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 20: Full-time employment trend over last 3 years</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Decreased  | 5            | 6%             |

|                 |    |      |
|-----------------|----|------|
| Increased       | 6  | 8%   |
| No Response     | 9  | 11%  |
| Stayed the same | 60 | 75%  |
| Total           | 80 | 100% |

Survey Respondents: 80

| <b>Figure 21: Full-time employment trend over next 3 years</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Will Decreased   | 1            | 1%             |
| No Response  | 9            | 11%            |
| Will Increase  | 23           | 29%            |
| Stay the Same  | 47           | 59%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 21b: Projected number of employees in 3 years</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 20-49   | 10           | 13%            |
| 10-19   | 22           | 28%            |
| Less than 5   | 48           | 60%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 22: Age of the majority of essential employees</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Less than 25   | 2            | 3%             |
| 26 - 34  | 10           | 13%            |
| 35 - 49  | 38           | 48%            |
| 50 or older  | 30           | 38%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 23: Wages in relation to other businesses in the region</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 24           | 30%            |
| Less than   | 9            | 11%            |
| Greater than  | 21           | 26%            |
| Same  | 26           | 33%            |
| Total   | 80           | 100%           |

Survey Respondents: 80



| <b>Figure 23b: Average hourly wage: Skilled / Professional</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 6            | 8%             |
| Under \$10   | 11           | 14%            |
| \$10-\$12  | 3            | 4%             |
| \$13-\$14  | 4            | 5%             |
| \$15-\$19  | 12           | 15%            |
| \$20-\$29  | 20           | 25%            |
| \$30-\$49  | 15           | 19%            |
| \$50-\$99  | 9            | 11%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 23c: Average hourly wage: Semi-skilled</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 8            | 10%            |
| Under \$10   | 22           | 28%            |
| \$10-\$12  | 12           | 15%            |
| \$13-\$14  | 3            | 4%             |
| \$15-\$19  | 20           | 25%            |
| \$20-\$29  | 14           | 18%            |
| \$30-\$49  | 1            | 1%             |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 23d: Average hourly wage: Entry- level</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 16           | 20%            |
| Under \$10   | 36           | 45%            |
| \$10-\$12  | 17           | 21%            |
| \$13-\$14  | 5            | 6%             |
| \$15-\$19  | 6            | 8%             |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 24: Trend in unfilled positions</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Increasing                                    | 2            | 3%             |
| Staying the Same                              | 39           | 49%            |
| No Response                                   | 39           | 49%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 25: Location of workforce recruitment</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| International                                       | 1            | 1%             |
| National  | 2            | 3%             |
| Provincial  | 4            | 5%             |
| Local   | 71           | 89%            |
| No Response   | 2            | 3%             |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 26: Recruitment and retention challenges</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Retention challenges                                   | 10           | 13%            |
| Recruitment challenges                                 | 22           | 28%            |

Survey Respondents: 80

| <b>Figure 26b: Retention Challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                             | 1            | 1%             |
| Yes                                     | 10           | 13%            |
| No                                      | 69           | 86%            |
| Total                                   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 26c: Recruitment Challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                               | 2            | 3%             |
| Yes                                       | 22           | 28%            |
| No  | 56           | 70%            |
| Total                                     | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 27: Responses to Recruitment Challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Machinists  | 1            | 3%             |
| Professional/Other                                    | 1            | 3%             |
| Construction/Contractors                              | 1            | 3%             |
| Electrical/Electronics                                | 1            | 3%             |
| Marketing   | 1            | 3%             |
| Graphics Arts/Printing                                | 1            | 3%             |
| Sales/Service   | 1            | 3%             |
| Food/Beverage Service                                 | 2            | 5%             |
| Agriculture/Farming                                   | 2            | 5%             |
| Administrative/Clerical                               | 3            | 8%             |

|                        |    |      |
|------------------------|----|------|
| Sales/Retail           | 3  | 8%   |
| Machine Operators      | 3  | 8%   |
| Professional/Technical | 4  | 10%  |
| Other                  | 16 | 40%  |
| Total                  | 40 | 100% |

Companies experiencing recruitment challenges:  
22

| <b>Figure 27b: Responses to 'Other' Recruitment Challenges</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Assistants   | 1            | 5%             |
| Board members  | 1            | 5%             |
| Carpenters   | 1            | 5%             |
| Co-ordinators  | 1            | 5%             |
| Computer technicians   | 1            | 5%             |
| Executive directors  | 1            | 5%             |
| Forestry technicians   | 1            | 5%             |
| Gardeners  | 1            | 5%             |
| Heating technicians  | 1            | 5%             |
| Machine operators  | 1            | 5%             |
| Tree fallers   | 1            | 5%             |
| Nutritionist   | 1            | 5%             |
| Online marketers   | 1            | 5%             |
| River guides   | 1            | 5%             |
| Scientists   | 1            | 5%             |
| Three season workers   | 1            | 5%             |
| No response  | 2            | 9%             |
| Web designers  | 2            | 9%             |
| Social media experts   | 2            | 9%             |
| Total  | 22           | 100%           |

Companies experiencing "Other" recruitment challenges:  
16

| <b>Figure 28: Future recruitment challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                                     | 1            | 1%             |
| Yes   | 27           | 34%            |
| No  | 52           | 65%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 28b: Responses to Future recruitment challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
|---|--------------|----------------|

|                            |    |      |
|----------------------------|----|------|
| None                       | 1  | 2%   |
| Hospitality Service        | 1  | 2%   |
| Construction/Contractors   | 1  | 2%   |
| Electrical/Electronics     | 1  | 2%   |
| Graphics Arts/Printing     | 1  | 2%   |
| Marketing                  | 1  | 2%   |
| Agriculture/Farming        | 2  | 4%   |
| Machine Operators          | 2  | 4%   |
| Sales/Retail               | 2  | 4%   |
| Food/Beverage Service      | 2  | 4%   |
| Administrative/Clerical    | 2  | 4%   |
| Professional/Technical     | 2  | 4%   |
| Prof/Info Tech/Programming | 2  | 4%   |
| Professional/Other         | 2  | 4%   |
| General Laborer            | 3  | 7%   |
| Sales/Service              | 3  | 7%   |
| Other                      | 17 | 38%  |
| Total                      | 45 | 100% |

Companies reporting future recruitment challenges:  
27

| <b>Figure 28c: Responses to 'Other' Future recruitment challenges</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Bookkeepers   | 1            | 4%             |
| Butchers  | 1            | 4%             |
| Computer technicians  | 1            | 4%             |
| Cooks   | 1            | 4%             |
| Executive directors   | 1            | 4%             |
| Farm hands  | 1            | 4%             |
| Male counselors   | 1            | 4%             |
| Marketers   | 1            | 4%             |
| Web designers   | 1            | 4%             |
| Produce clerks  | 1            | 4%             |
| Program co-ordinators   | 1            | 4%             |
| River guides  | 1            | 4%             |
| Seasonal workers  | 1            | 4%             |
| Servers   | 1            | 4%             |
| Trail builders  | 1            | 4%             |
| Washers   | 1            | 4%             |
| No response   | 7            | 30%            |
| Total   | 23           | 100%           |

Companies reporting "other" future recruitment challenges:

| <b>Figure 29: Is there anything we can do to help overcome issues with employee recruitment?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 2            | 3%             |
| Yes  | 20           | 25%            |
| No   | 58           | 73%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 29b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Relocation assistance   | 1            | 5%             |
| Establish a primary industry  | 1            | 5%             |
| Provide better healthcare services  | 1            | 5%             |
| Fund internship and mentoring program   | 1            | 5%             |
| Promote forestry training   | 1            | 5%             |
| Subsidize training  | 1            | 5%             |
| Encourage young people to live and work here  | 2            | 10%            |
| Expand wage subsidies   | 2            | 10%            |
| No Response   | 3            | 15%            |
| Establish a local job bank  | 7            | 35%            |
| Total   | 20           | 100%           |

Companies reporting "Yes" to "Is there anything we can do to help overcome issues with employee recruitment": 20

| <b>Figure 30: Skill Level of Majority of Workforce</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Skilled / Professional                                 | 57           | 71%            |
| Semi-Skilled   | 21           | 26%            |
| Entry-Level  | 0            | 0%             |
| Less than 50% or Not Reported                          | 2            | 3%             |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 30b: Skilled / Professional Employees as % of Workforce</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 25 to 49%   | 8            | 10%            |
| 50 to 74%   | 14           | 18%            |
| less than 25%   | 15           | 19%            |
| 75 to 100%  | 43           | 54%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 30c: Semi-Skilled Employees as % of Workforce</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 50 to 74%   | 10           | 13%            |
| 75 to 100%  | 11           | 14%            |
| 25 to 49%   | 17           | 21%            |
| less than 25%   | 42           | 53%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 30d: Entry-Level Employees as % of Workforce</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 25 to 49%  | 13           | 16%            |
| less than 25%  | 67           | 84%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 31: Training Budget</b> | <b>Count</b> | <b>Percent</b> |
|-----------------------------------|--------------|----------------|
| No Response                       | 2            | 3%             |
| Yes                               | 36           | 45%            |
| No                                | 42           | 53%            |
| Total                             | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 31b: Does the company offer in-house training?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No   | 19           | 24%            |
| Yes  | 61           | 76%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 31c: Does the company use Contracted Training?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Yes  | 17           | 21%            |
| No   | 63           | 79%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 32: Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 1%             |
| No   | 38           | 48%            |
| Yes  | 41           | 51%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 33: Are there areas of training or professional development that would be of benefit to you or your employees?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 2            | 3%             |
| No   | 16           | 20%            |
| Yes  | 62           | 78%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 33b: Training or professional development needs</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Landscape design  | 1            | 1%             |
| Retail training   | 1            | 1%             |
| Succession training   | 1            | 1%             |
| Culinary school   | 1            | 1%             |
| Resort management   | 1            | 1%             |
| Equestrian education  | 1            | 1%             |
| Professional driver training                                  | 1            | 1%             |
| Horticulture training   | 1            | 1%             |

|                              |     |      |
|------------------------------|-----|------|
| Fundraising                  | 1   | 1%   |
| No Response                  | 2   | 2%   |
| Customer service             | 2   | 2%   |
| Foodsafe                     | 4   | 4%   |
| Sales                        | 5   | 5%   |
| First Aid & Safety training  | 5   | 5%   |
| Business management training | 8   | 8%   |
| Marketing                    | 9   | 9%   |
| Social media for business    | 10  | 10%  |
| Web development              | 12  | 12%  |
| Computer training            | 17  | 17%  |
| Bookkeeping                  | 18  | 18%  |
| Total                        | 101 | 100% |

Yes Survey Respondents: 62

| <b>Figure 34: What new training might you need to consider in the next five years?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Airbrushing  | 1            | 1%             |
| Battery technology   | 1            | 1%             |
| Physiotherapy  | 1            | 1%             |
| Water resource management  | 1            | 1%             |
| Customer service   | 1            | 1%             |
| Electronics  | 1            | 1%             |
| Pharmacology   | 1            | 1%             |
| HVAC (Heating, ventilation, and air conditioning) upgrading                            | 1            | 1%             |
| Ultrasound   | 1            | 1%             |
| Landscape design   | 1            | 1%             |
| Sales  | 2            | 2%             |
| First aid & safety training  | 2            | 2%             |
| Bookkeeping  | 2            | 2%             |
| Plant sciences   | 2            | 2%             |
| Web design   | 4            | 4%             |
| Solar technology   | 6            | 6%             |
| Computer training  | 6            | 6%             |
| Keeping up with tech change  | 9            | 9%             |
| Social media training  | 9            | 9%             |
| Marketing Skills   | 13           | 12%            |



|             |     |      |
|-------------|-----|------|
| No Response | 40  | 38%  |
| Total       | 105 | 100% |

Survey Respondents: 80

| <b>Figure 35: Preferred Modes of Training</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Other   | 10           | 6%             |
| Online/ Webinar training                      | 40           | 25%            |
| Classroom                                     | 50           | 32%            |
| Individual coaching                           | 57           | 36%            |
| Total   | 157          | 100%           |

Survey Respondents: 80

| <b>Figure 36: Usual Training Locations</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response                                | 1            | 1%             |
| Rest of Canada                             | 5            | 4%             |
| United States                              | 9            | 8%             |
| Regional                                   | 21           | 19%            |
| British Columbia                           | 25           | 22%            |
| Local                                      | 51           | 46%            |
| Total                                      | 112          | 100%           |

Survey Respondents: 80

| <b>Union Status</b> | <b>Count</b> | <b>Percent</b> |
|---------------------|--------------|----------------|
| Yes                 | 2            | 3%             |
| No                  | 34           | 43%            |
| Not applicable      | 44           | 55%            |
| Total               | 80           | 100%           |

Survey Respondents: 80

## SALES

| <b>Figure 37: Annual Sales</b> | <b>Count</b> | <b>Percent</b> |
|--------------------------------|--------------|----------------|
| Confidential/ no response      | 26           | 33%            |
| over \$5 million               | 1            | 1%             |
| \$1million to \$4.99 million   | 7            | 9%             |
| \$500,000 to \$999,999         | 5            | 6%             |
| \$100,000 to \$499,999         | 16           | 20%            |
| Under \$100,000                | 25           | 31%            |
| Total                          | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 38: Status of Market</b> | <b>Count</b> | <b>Percent</b> |
|------------------------------------|--------------|----------------|
| No Response                        | 2            | 3%             |
| Decreasing                         | 9            | 11%            |
| Stable                             | 29           | 36%            |
| Increasing                         | 40           | 50%            |
| Total                              | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 39: Market Share in Comparison to Competitors</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 19           | 24%            |
| Decreasing  | 6            | 8%             |
| Stable  | 27           | 34%            |
| Increasing  | 28           | 35%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 40: Projected Sales Growth in Upcoming Year</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 100% or more  | 5            | 6%             |
| 50-99%  | 3            | 4%             |
| 25-49%  | 5            | 6%             |
| 10-24%  | 21           | 26%            |
| 1-9%  | 21           | 26%            |
| 0%  | 11           | 14%            |
| Declining   | 5            | 6%             |
| Confidential/ no response                                 | 9            | 11%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 41: Historical Sales Trend (at this Location)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 5            | 6%             |
| Staying the same  | 15           | 19%            |
| Decreasing  | 15           | 19%            |
| Increasing  | 45           | 56%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 42: Historical Sales Trend (at the Parent Company)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Staying the same   | 1            | 1%             |

|                            |    |      |
|----------------------------|----|------|
| Declining                  | 1  | 1%   |
| Increasing                 | 7  | 9%   |
| Not Applicable/No response | 71 | 89%  |
| Total                      | 80 | 100% |

Survey Respondents: 80

| <b>Figure 43: Historical Sales Trend (within the Industry)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Declining  | 11           | 14%            |
| Staying the same   | 16           | 20%            |
| Increasing   | 26           | 33%            |
| Not Applicable/No response                                     | 27           | 34%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 44: Historical Export Sales Trend</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Declining                                       | 1            | 1%             |
| Staying the same                                | 3            | 4%             |
| Increasing                                      | 8            | 10%            |
| Not Applicable/No response                      | 68           | 85%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 45: Geographic Source of Majority of Sales</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| United States  | 4            | 5%             |
| National   | 2            | 3%             |
| Provincial   | 9            | 11%            |
| International  | 0            | 0%             |
| Local  | 58           | 73%            |
| Less than 50% or Not Reported                            | 7            | 8%             |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 45b Source of Sales (Local/Regional)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 0% or no answer                                    | 5            | 6%             |
| under 50%  | 17           | 21%            |

|        |      |    |      |
|--------|------|----|------|
|        | 100% | 26 | 33%  |
| 50-99% |      | 32 | 40%  |
| Total  |      | 80 | 100% |

Survey Respondents: 80

| <b>Figure 45c: Source of Sales (International)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| under 50%  | 18           | 23%            |
| 0% or no answer                                    | 62           | 78%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 45d: Source of Sales (United States)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 50-99%   | 4            | 5%             |
| under 50%  | 24           | 30%            |
| 0% or no answer                                    | 52           | 65%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 45e: Source of Sales (National)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 50-99%  | 2            | 3%             |
| under 50%                                     | 31           | 39%            |
| 0% or no answer                               | 47           | 59%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 45f: Source of Sales (Provincial)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 50-99%  | 9            | 2%             |
| 0% or no answer                                 | 31           | 15%            |
| under 50%                                       | 40           | 21%            |
| Total   | 80           | 62%            |
| Survey Respondents: 80                          |              | 100%           |

| <b>Figure 46: International Trade Status</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Import                                       | 7            | 9%             |
| Export                                       | 13           | 16%            |
| None/ not applicable                         | 62           | 76%            |
| Total  | 82           | 100%           |

Survey Respondents: 80

| <b>Figure 47: Geographic Source of Majority of Supplies</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| United States   | 4            | 5%             |
| National  | 8            | 10%            |
| Provincial  | 24           | 30%            |
| International   | 2            | 3%             |
| Local   | 38           | 48%            |
| Less than 50% or Not Reported                               | 4            | 5%             |

| <b>Figure 47b: Source of Supplies (Provincial)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 100%   | 1            | 1%             |
| 50-99%   | 23           | 29%            |
| 0% or no answer                                    | 23           | 29%            |
| under 50%  | 33           | 41%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 47c: Source of Supplies (Local/Regional)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 0% or no answer  | 7            | 9%             |
| 100%   | 11           | 14%            |
| 50-99%   | 27           | 34%            |
| under 50%  | 35           | 44%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 47d: Source of Supplies (National)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 50-99%   | 8            | 10%            |
| under 50%  | 26           | 33%            |
| 0% or no answer                                  | 46           | 57%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 47e: Source of Supplies (United States)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 50-99%  | 4            | 5%             |
| under 50%   | 20           | 25%            |
| 0% or no answer                                       | 56           | 70%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 47f: Source of Supplies (International)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 50-99%  | 2            | 3%             |
| under 50%   | 9            | 11%            |
| 0% or no answer                                       | 69           | 86%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

## **FACILITIES AND EQUIPMENT**

| <b>Figure 48: Facility Size</b> | <b>Count</b> | <b>Percent</b> |
|---------------------------------|--------------|----------------|
| Less than 1,000 sq ft           | 38           | 48%            |
| 1,000 to 4,999 sq ft            | 26           | 33%            |
| 5,000-9,999 sq ft               | 3            | 4%             |
| 10,000-19,999 sq ft             | 4            | 5%             |
| 20,000 sq ft or more            | 9            | 11%            |
| Total                           | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 49: Condition of Facility</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                             | 4            | 5%             |
| Poor                                    | 4            | 5%             |
| Fair                                    | 14           | 18%            |
| Good                                    | 42           | 53%            |
| Excellent                               | 16           | 20%            |
| Total                                   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 50: Condition of Equipment</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response                              | 6            | 8%             |
| Poor                                     | 2            | 3%             |
| Fair                                     | 7            | 9%             |
| Good                                     | 49           | 61%            |
| Excellent                                | 16           | 20%            |
| Total                                    | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 51: Ownership Status of facility</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
|--|--------------|----------------|

|             |    |      |
|-------------|----|------|
| No Response | 1  | 1%   |
| Leased      | 27 | 34%  |
| Owned       | 52 | 65%  |
| Total       | 80 | 100% |

Survey Respondents: 80

| <b>Figure 52: Length of Time Remaining on Lease</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 8            | 30%            |
| Less than 1 yr                                      | 11           | 41%            |
| 3-5 yrs   | 3            | 11%            |
| More than 5 yrs                                     | 5            | 19%            |
| Total   | 27           | 100%           |

businesses that lease: 27

| <b>Figure 52b: Planning to renew current lease</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 4%             |
| No   | 3            | 11%            |
| Yes  | 23           | 85%            |
| Total  | 27           | 100%           |

Businesses that lease:  
27

| <b>Figure 53: Historical investment trends: Over past 18 months in the facility</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 12           | 15%            |
| Declining   | 5            | 6%             |
| Increasing  | 24           | 30%            |
| Staying the same  | 39           | 49%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 54: Expansion Plans (Does the company plan to expand in the next three years?)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 2            | 3%             |
| Yes  | 37           | 46%            |
| No   | 41           | 51%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 55: Is there room for expansion at this site?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 2            | 3%             |
| Maybe   | 10           | 13%            |
| No  | 26           | 33%            |
| Yes   | 42           | 53%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 56: Adequacy of Current Site for Expansion</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No   | 10           | 27%            |
| Yes  | 27           | 73%            |
| Total  | 37           | 100%           |

Respondents planning to expand: 37

| <b>Figure 57: Does the company plan to expand in the next three years?: Will it be in this community?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No  | 2            | 5%             |
| Yes   | 35           | 95%            |
| Total   | 37           | 100%           |

Survey Respondents answering Yes to "Does the company plan to expand in the next three years?" : 37

| <b>Figure 58: Estimated Total Investment in Expansion</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Less than \$25,000  | 14           | 38%            |
| \$25,000-\$99,999   | 10           | 27%            |
| \$100,000-\$499,999                                       | 8            | 22%            |
| \$500,000-\$999,999                                       | 1            | 3%             |
| \$1.0 million-\$9.9 million                               | 0            | 0%             |
| \$10-19.9 million   | 1            | 3%             |
| No Response   | 3            | 8%             |
| Total   | 37           | 100%           |

Respondents planning to expand: 37

| <b>Figure 59: Expansion Budget for Equipment &amp; Technology</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
|---|--------------|----------------|



|             |    |      |
|-------------|----|------|
| 0%          | 4  | 11%  |
| 1 to 9%     | 2  | 5%   |
| 10 to 19%   | 0  | 0%   |
| 20 to 29%   | 5  | 14%  |
| 30 to 49%   | 0  | 0%   |
| 50 to 59%   | 3  | 8%   |
| 60 to 69%   | 0  | 0%   |
| 70 to 79%   | 3  | 8%   |
| 80 to 89%   | 1  | 3%   |
| 90 to 99%   | 1  | 3%   |
| 100%        | 13 | 35%  |
| No Response | 5  | 14%  |
| Total       | 37 | 100% |

Respondents planning to expand: 37

| <b>Figure 60: Expansion Budget for Real Estate</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| 0%   | 17           | 46%            |
| 1 to 9%  | 1            | 3%             |
| 10 to 19%  | 0            | 0%             |
| 20 to 29%  | 3            | 8%             |
| 30 to 49%  | 0            | 0%             |
| 50 to 59%  | 3            | 8%             |
| 60 to 69%  | 0            | 0%             |
| 70 to 79%  | 3            | 8%             |
| 80 to 89%  | 1            | 3%             |
| 90 to 99%  | 1            | 3%             |
| 100%   | 3            | 8%             |
| No Response  | 5            | 14%            |
| Total  | 37           | 100%           |

Respondents planning to expand: 37

| <b>Figure 61: Size of Facility Expansion</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Less than 1,000 sq ft                        | 22           | 59%            |
| 1,000 to 4,999 sq ft                         | 8            | 22%            |
| 5,000-9,999 sq ft                            | 1            | 3%             |
| 10,000-19,999 sq ft                          | 1            | 3%             |
| 20,000 sq ft or more                         | 1            | 3%             |
| No Response                                  | 4            | 11%            |
| Total  | 37           | 100%           |

Respondents planning to expand: 37

| <b>Figure 62: Have there been any recent facility upgrades?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 2            | 3%             |
| No  | 33           | 41%            |
| Yes   | 45           | 56%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 62b: Have there been any recent facility upgrades? If Yes, when?: Month scale</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| 3   | 16           | 20%            |
| 6   | 8            | 10%            |
| 12  | 8            | 10%            |
| 18  | 3            | 4%             |
| 24  | 3            | 4%             |
| 36  | 5            | 6%             |
| No Response   | 2            | 46%            |
| Total   | 45           | 100%           |

Survey Respondents: 45

| <b>Figure 63: Planning any upgrades to the facility?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 4            | 5%             |
| No   | 31           | 39%            |
| Yes  | 45           | 56%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 63b: Planning any upgrades to the facility? If Yes, when?: Month scale</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 2%             |
| 3  | 17           | 38%            |
| 6  | 11           | 24%            |
| 12   | 12           | 27%            |
| 24   | 3            | 7%             |
| 36   | 1            | 2%             |
| Total  | 45           | 100%           |

Survey Respondents answering Yes:45

| <b>Figure 63c: If No, are there any barriers to upgrading you wish to identify?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Financing   | 3            | 10%            |
| No Response   | 28           | 90%            |
| Total   | 31           | 100%           |

Survey Respondents answering no : 31

| <b>Figure 64: Barriers to Expansion</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response                             | 2            | 2%             |
| Problems with Development Approvals     | 3            | 3%             |
| Roads                                   | 3            | 3%             |
| Energy reliability                      | 5            | 4%             |
| Energy costs                            | 5            | 4%             |
| Other                                   | 5            | 4%             |
| Warehousing                             | 6            | 5%             |
| Local regulations (zoning)              | 6            | 5%             |
| Transport/freight                       | 6            | 5%             |
| Lack of skilled staff                   | 10           | 9%             |
| Broadband access                        | 10           | 9%             |
| Lack of suitable premises               | 11           | 9%             |
| Identifying and accessing new markets   | 14           | 12%            |
| Finance                                 | 30           | 26%            |
| Total                                   | 116          | 100%           |

Respondents planning to expand: 37

| <b>Figure 64b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Annual insurance costs   | 1            | 20%            |
| Economic climate   | 1            | 20%            |
| No Response  | 1            | 20%            |
| Time   | 1            | 20%            |

|                            |   |      |
|----------------------------|---|------|
| Accommodation for visitors | 1 | 20%  |
| Total                      | 5 | 100% |

Survey Respondents "Other": 5

| <b>Figure 65: Expansion Assistance from Support Organization</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| BC Ministry responsible for Economic Development                 | 1            | 2%             |
| Community Futures  | 1            | 2%             |
| Local Economic Development Office                                | 2            | 4%             |
| BC Hydro   | 2            | 4%             |
| Local Council  | 3            | 6%             |
| Chamber of Commerce  | 4            | 9%             |
| Other  | 5            | 11%            |
| No Response  | 29           | 62%            |
| Total  | 47           | 100%           |

Respondents planning to expand: 37

| <b>Figure 65b: Sought Expansion Assistance</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Yes  | 8            | 22%            |
| No   | 29           | 78%            |
| Total  | 37           | 100%           |

Respondents planning to expand: 37

| <b>Figure 65c: If Yes, which have you approached?: Other (please specify)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Federal Government  | 1            | 14%            |
| Fortis  | 1            | 14%            |
| Front Counter BC consultant   | 1            | 14%            |
| No Response   | 1            | 14%            |
| Regional strategic players  | 1            | 14%            |
| Columbia Basin Trust  | 2            | 29%            |
| Total   | 7            | 100%           |

Survey Respondents answering "Other": 5

| <b>Figure 66: Awareness of BC Hydro Power Smart</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No Response   | 2            | 3%             |
| No  | 31           | 39%            |
| Yes   | 47           | 59%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

## GOVERNMENT SERVICES

| <b>Figure 67: Rating of Government Services</b> | <b>Not Applicable</b> | <b>% Not Applicable</b> | <b>Poor</b> | <b>% Poor</b> | <b>Fair</b> | <b>% Fair</b> | <b>Good</b> | <b>% Good</b> | <b>Excellent</b> | <b>% Excellent</b> | <b>Total Respondents</b> |
|---|-----------------------|-------------------------|-------------|---------------|-------------|---------------|-------------|---------------|------------------|--------------------|--------------------------|
| Access to Port Facilities                       | 66                    | 83%                     | 13          | 16%           | 1           | 1%            | 0           | 0%            | 0                | 0%                 | 80                       |
| Access to US Border                             | 33                    | 41%                     | 3           | 4%            | 13          | 16%           | 27          | 34%           | 4                | 5%                 | 80                       |
| Access to airport facilities                    | 31                    | 39%                     | 32          | 40%           | 11          | 14%           | 5           | 6%            | 1                | 1%                 | 80                       |
| Access to highway/ roads                        | 4                     | 5%                      | 14          | 18%           | 17          | 21%           | 34          | 43%           | 11               | 14%                | 80                       |
| Access to markets                               | 10                    | 13%                     | 10          | 13%           | 28          | 35%           | 26          | 33%           | 6                | 8%                 | 80                       |
| Access to suppliers                             | 4                     | 5%                      | 9           | 11%           | 35          | 44%           | 27          | 34%           | 5                | 6%                 | 80                       |
| Availability of appropriately zoned land        | 44                    | 55%                     | 4           | 5%            | 11          | 14%           | 18          | 23%           | 3                | 4%                 | 80                       |
| Availability of buildings for lease or purchase | 35                    | 44%                     | 14          | 18%           | 15          | 19%           | 14          | 18%           | 2                | 3%                 | 80                       |
| Availability of rail transport                  | 63                    | 79%                     | 15          | 19%           | 1           | 1%            | 1           | 1%            | 0                | 0%                 | 80                       |
| Availability of road transport services         | 8                     | 10%                     | 16          | 20%           | 24          | 30%           | 30          | 38%           | 2                | 3%                 | 80                       |
| Availability of warehousing                     | 51                    | 64%                     | 12          | 15%           | 8           | 10%           | 8           | 10%           | 1                | 1%                 | 80                       |
| Development approval process                    | 44                    | 55%                     | 8           | 10%           | 11          | 14%           | 14          | 18%           | 3                | 4%                 | 80                       |
| Disposal of waste material                      | 16                    | 20%                     | 6           | 8%            | 15          | 19%           | 36          | 45%           | 7                | 9%                 | 80                       |
| Inspections /licensing                          | 32                    | 40%                     | 3           | 4%            | 12          | 15%           | 30          | 38%           | 3                | 4%                 | 80                       |
| Recycling                                       | 7                     | 9%                      | 4           | 5%            | 22          | 28%           | 41          | 51%           | 6                | 8%                 | 80                       |
| Telecommunications (internet, cell)             | 4                     | 5%                      | 18          | 23%           | 26          | 33%           | 27          | 34%           | 5                | 6%                 | 80                       |
| Water and sewerage supply                       | 22                    | 28%                     | 7           | 9%            | 10          | 13%           | 35          | 44%           | 6                | 8%                 | 80                       |
| Other   | 70                    | 88%                     | 9           | 11%           | 1           | 1%            | 0           | 0%            | 0                | 0%                 | 80                       |

Survey Respondents: 80

| <b>Figure 68: Key words and responses in respondents' suggestions for improvements to government services</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Waste disposal  | 1            | 1%             |
| Transportation  | 1            | 1%             |
| Development approval process  | 1            | 1%             |
| Emergency care  | 1            | 1%             |
| Postal service  | 1            | 1%             |
| Public transportation   | 2            | 2%             |
| Recycling services  | 3            | 4%             |
| Affordable housing  | 4            | 5%             |
| Emergency services  | 5            | 6%             |
| Waste water and sewage services   | 5            | 6%             |
| Airport Services  | 6            | 7%             |
| Improve shipping  | 8            | 10%            |
| Cellular service  | 11           | 13%            |
| Road maintenance  | 15           | 18%            |
| Internet service  | 20           | 24%            |
| Total   | 84           | 100%           |

Survey Respondents answering Yes: 58

| <b>Figure 69: Which airport services do you use?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Seattle  | 1            | 1%             |
| Vancouver  | 1            | 1%             |
| Trail  | 11           | 10%            |
| Kelowna  | 14           | 13%            |
| Spokane  | 19           | 17%            |
| None   | 18           | 17%            |
| West Kootenay Regional Airport (Castlegar)           | 34           | 31%            |
| No Response  | 11           | 10%            |
| Total  | 109          | 100%           |

Survey Respondents: 80

| <b>Figure 69b: (Relates to Please rate the following: Access to airport facilities...) Do you have any suggestions on how to improve any of the services and infrastructure listed above?</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No  | 22           | 28%            |

|       |    |      |
|-------|----|------|
| Yes   | 58 | 73%  |
| Total | 80 | 100% |

Survey Respondents: 80

| <b>Figure 70: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Improved security   | 1            | 1%             |
| Commuter plane to Kelowna   | 1            | 1%             |
| Courier service   | 1            | 1%             |
| Designated landing spot   | 1            | 1%             |
| Development of local Kaslo airport  | 1            | 1%             |
| Regular flights from the Kaslo airport  | 1            | 1%             |
| GPS landing strip technology  | 1            | 1%             |
| Improved runway   | 1            | 1%             |
| Tourist information centres at regional airports  | 1            | 1%             |
| No comment  | 2            | 2%             |
| See it operating  | 3            | 4%             |
| Lower fare prices   | 3            | 4%             |
| Air transport regionally and locally  | 4            | 5%             |
| Shuttle service to regional airports  | 5            | 6%             |
| Flight reliability  | 12           | 14%            |
| No Response   | 47           | 55%            |
| Total   | 85           | 100%           |

Survey Respondents: 80

## BUSINESS CLIMATE

| <b>Figure 71: Please rate the local business climate</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Excellent  | 1            | 1%             |
| Good   | 12           | 15%            |
| Poor   | 16           | 20%            |
| Fair   | 48           | 60%            |
| No Response  | 3            | 4%             |
| Total  | 80           | 100%           |

Survey Respondents: 80



| <b>Figure 72: Business Climate Factors</b> | <b>No Opinion</b> | <b>% No Opinion</b> | <b>Poor</b> | <b>% Poor</b> | <b>Fair</b> | <b>% Fair</b> | <b>Good</b> | <b>% Good</b> | <b>Excellent</b> | <b>% Excellent</b> | <b>Total Responses</b> |
|--|-------------------|---------------------|-------------|---------------|-------------|---------------|-------------|---------------|------------------|--------------------|------------------------|
| BIA  | 76                | 95%                 | 2           | 3%            | 0           | 0%            | 0           | 0%            | 2                | 3%                 |                        |
| Chamber of Commerce                        | 26                | 33%                 | 8           | 10%           | 22          | 28%           | 22          | 28%           | 2                | 3%                 |                        |
| Colleges/Universities                      | 17                | 21%                 | 12          | 15%           | 19          | 24%           | 29          | 36%           | 3                | 4%                 |                        |
| Community Futures                          | 33                | 41%                 | 4           | 5%            | 7           | 9%            | 26          | 33%           | 10               | 13%                |                        |
| Cultural/Recreational Amenities            | 4                 | 5%                  | 6           | 8%            | 20          | 25%           | 36          | 45%           | 14               | 18%                |                        |
| Economic Development                       | 9                 | 11%                 | 29          | 36%           | 32          | 40%           | 9           | 11%           | 1                | 1%                 |                        |
| Housing                                    | 6                 | 8%                  | 23          | 29%           | 34          | 43%           | 16          | 20%           | 1                | 1%                 |                        |
| K-12 education                             | 7                 | 9%                  | 16          | 20%           | 12          | 15%           | 34          | 43%           | 11               | 14%                |                        |
| Local Government                           | 11                | 14%                 | 5           | 6%            | 21          | 26%           | 35          | 44%           | 8                | 10%                |                        |
| Local Tax Structure                        | 18                | 23%                 | 12          | 15%           | 28          | 35%           | 19          | 24%           | 3                | 4%                 |                        |
| Technical Training                         | 30                | 38%                 | 16          | 20%           | 22          | 28%           | 10          | 13%           | 2                | 3%                 |                        |
| Tourism services                           | 11                | 14%                 | 6           | 8%            | 24          | 30%           | 34          | 43%           | 5                | 6%                 |                        |
| Workforce Availability                     | 12                | 15%                 | 10          | 13%           | 28          | 35%           | 27          | 34%           | 3                | 4%                 |                        |
| Workforce Quality                          | 13                | 16%                 | 1           | 1%            | 22          | 28%           | 30          | 38%           | 14               | 18%                |                        |
| Workforce Stability                        | 13                | 16%                 | 11          | 14%           | 25          | 31%           | 26          | 33%           | 5                | 6%                 |                        |

Survey Respondents: 80

| <b>Figure 73: Business Climate Today vs. 5 Years Ago</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No opinion   | 4            | 5%             |
| No change  | 18           | 23%            |
| Worse today  | 28           | 35%            |
| Better today   | 30           | 38%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 74: Business Climate 5 Years from Today</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No change   | 10           | 13%            |
| No opinion  | 14           | 18%            |
| Will be worse   | 1            | 1%             |
| Will be better  | 55           | 69%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 75: Community's Strengths as a Place to do Business</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Art community   | 1            | 1%             |
| Knowledgeable people  | 1            | 1%             |
| Great people  | 1            | 1%             |
| Awesome farmers   | 1            | 1%             |
| Festivities   | 1            | 1%             |
| Entrepreneurial spirit  | 2            | 2%             |
| Artisan culture   | 2            | 2%             |
| High speed internet   | 3            | 3%             |
| Diversity of people and skills                                    | 3            | 3%             |
| Word of mouth advertising   | 4            | 5%             |
| Recreation  | 4            | 5%             |
| Customer loyalty  | 5            | 6%             |
| Lifestyle   | 6            | 7%             |
| Natural environment   | 7            | 8%             |
| Attractive to tourists  | 7            | 8%             |
| Beautiful location  | 11           | 13%            |
| Supportive community  | 29           | 33%            |
| Total   | 88           | 100%           |

Survey Respondents: 80

| <b>Figure 76: Community's Weaknesses as a Place to do Business</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Support for local businesses                                       | 1            | 1%             |
| Declining forest resource  | 1            | 1%             |
| Resistance to change   | 2            | 2%             |
| Airport services   | 2            | 2%             |
| Lack of trained workforce  | 2            | 2%             |
| Un-receptive local government                                      | 2            | 2%             |
| Health care services   | 2            | 2%             |
| No base industry   | 4            | 4%             |
| No response  | 4            | 4%             |
| Expensive supplies   | 4            | 4%             |
| Poor internet service  | 5            | 5%             |
| Poorly maintained roads  | 6            | 6%             |
| Challenging economic climate                                       | 6            | 6%             |
| Lack of employment opportunities                                   | 7            | 7%             |
| Access to supplies   | 8            | 8%             |
| Expensive shipping   | 8            | 8%             |
| Availability of services   | 11           | 11%            |
| Small population   | 12           | 12%            |
| Remote location  | 15           | 15%            |
| Total  | 102          | 100%           |

Survey Respondents: 80

| <b>Figure 77: Barriers to Growth in Community</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| No  | 20           | 25%            |
| Yes   | 60           | 75%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 77b: Barriers to Growth in Community. If Yes, what are they?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Environmental concerns   | 1            | 1%             |

|                                  |    |      |
|----------------------------------|----|------|
| Cost of living                   | 1  | 1%   |
| Small tax base                   | 1  | 1%   |
| Resistance to change             | 2  | 2%   |
| High speed internet              | 2  | 2%   |
| Limited workforce                | 2  | 2%   |
| Lack of adequate infrastructure  | 3  | 3%   |
| Lack of educational services     | 3  | 3%   |
| Low incomes                      | 3  | 3%   |
| No room to expand                | 3  | 3%   |
| High shipping costs              | 3  | 3%   |
| Affordable housing               | 4  | 4%   |
| No main industry                 | 5  | 5%   |
| Poor road maintenance            | 5  | 5%   |
| Lack of support for tourism      | 5  | 5%   |
| Remote location                  | 8  | 9%   |
| Challenging economy              | 9  | 10%  |
| Limited employment opportunities | 10 | 11%  |
| Health care service              | 10 | 11%  |
| Small population                 | 12 | 13%  |
| Total                            | 92 | 100% |

Yes Survey Respondents: 60

| <b>Figure 78: Are there suppliers you think could locate in this region?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 1%             |
| Yes  | 22           | 28%            |
| No   | 57           | 71%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 78b: Are there suppliers you think could locate in this region?: If Yes, please list</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Berry pickers  | 1            | 5%             |
| Bus Service  | 1            | 5%             |
| Electrical Wholesaler  | 1            | 5%             |

|                                 |    |      |
|---------------------------------|----|------|
| Farmers                         | 1  | 5%   |
| Food warehouse                  | 1  | 5%   |
| Skilled craftsmanship           | 1  | 5%   |
| Ski and Bike Shop               | 1  | 5%   |
| Paper Shredder                  | 1  | 5%   |
| Plumbing and heating wholesaler | 1  | 5%   |
| Printers                        | 1  | 5%   |
| Public notary                   | 1  | 5%   |
| Technical support professionals | 1  | 5%   |
| Helicopter services             | 2  | 9%   |
| No Response                     | 8  | 36%  |
| Total                           | 22 | 100% |

Yes Survey Respondents: 22

| <b>Figure 79: Do you supply your products or services to any company in the community or region?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 1%             |
| No   | 31           | 39%            |
| Yes  | 48           | 60%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 80: What sectors, business or industry do you think the community should try to attract?</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| No Response  | 1            | 1%             |
| No   | 6            | 8%             |
| Yes  | 73           | 91%            |
| Total  | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 80b: What sectors, business or industry do you think the community should try to attract?: If Yes, please list</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| Child care centres   | 1            | 1%             |

|                             |     |      |
|-----------------------------|-----|------|
| Outdoor recreation training | 1   | 1%   |
| Local courier               | 3   | 2%   |
| Airport                     | 2   | 2%   |
| Convention centre           | 2   | 2%   |
| Cottage industries          | 2   | 2%   |
| Industrial park             | 2   | 2%   |
| Environmental organizations | 2   | 2%   |
| Farmers                     | 2   | 2%   |
| Technical services          | 2   | 2%   |
| Arts and culture            | 4   | 3%   |
| Forestry                    | 4   | 3%   |
| Recreation centre           | 5   | 4%   |
| Mining                      | 5   | 4%   |
| Hospitality / Accommodation | 5   | 4%   |
| Educational institutions    | 6   | 5%   |
| Agriculture                 | 6   | 5%   |
| Internet jobs               | 7   | 6%   |
| Home based businesses       | 9   | 7%   |
| Online businesses           | 9   | 7%   |
| Small manufacturing         | 12  | 10%  |
| Tourism                     | 32  | 26%  |
| Total                       | 123 | 100% |

Yes Survey Respondents: 73

## ASSESSMENT AND PLANS

| <b>Figure 81: Facility's Overall Health</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Poor  | 3            | 4%             |
| Fair  | 14           | 18%            |
| Good  | 45           | 56%            |
| Excellent                                   | 15           | 19%            |
| Not applicable                              | 3            | 4%             |
| Total                                       | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 82: Parent Company Health</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Excellent                               | 2            | 3%             |
| Good                                    | 7            | 9%             |

|                |    |      |
|----------------|----|------|
| Not applicable | 71 | 89%  |
| Total          | 80 | 100% |

Survey Respondents: 80

| <b>Figure 83: Local Management's Attitude Towards Community</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Poor  | 1            | 1%             |
| Fair  | 2            | 3%             |
| Good  | 34           | 43%            |
| Excellent   | 37           | 46%            |
| Not applicable  | 6            | 8%             |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 84: Parent Company's Attitude Towards Community</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| Poor  | 1            | 1%             |
| Good  | 5            | 6%             |
| Excellent   | 5            | 6%             |
| Not applicable  | 69           | 86%            |
| Total   | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 85: Risk of Facility Closing</b> | <b>Count</b> | <b>Percent</b> |
|--|--------------|----------------|
| High                                       | 2            | 3%             |
| Moderate                                   | 11           | 14%            |
| Low  | 64           | 80%            |
| No Response                                | 3            | 4%             |
| Total                                      | 80           | 100%           |

Survey Respondents: 80

| <b>Figure 86: Risk of Facility Downsizing</b> | <b>Count</b> | <b>Percent</b> |
|---|--------------|----------------|
| High  | 3            | 4%             |
| Moderate                                      | 8            | 10%            |
| Low   | 67           | 84%            |
| No Response                                   | 2            | 3%             |
| Total   | 80           | 100%           |

Survey Respondents: 80