COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON KIMBERLEY BUSINESSES

WINTER 2015

The Kimberley Business Retention and Expansion project is a community-driven effort undertaken in partnership with the Kimberley and District Chamber of Commerce and the City of Kimberley focused on identifying the needs of our existing businesses.

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

Executive Summary

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 60 businesses in the City of Kimberley. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

Key Research Findings

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Retail and Wholesale Trade' under the North American Industry Classification system.
	Over half of the companies are 'growing'.
	Most businesses report being in business from 1 – 4 years.
	Only 23% of businesses anticipate a change in ownership.
Local Workforce	The majority of businesses have less than five employees.
	A little over half of the employment is full time.
Sales	Over half of businesses report that their sales are increasing.
	Most businesses report annual sales in the $100,000 - $499,999 range.
	The historic sales trend at this location and in the industry is increasing.
	32% of businesses report the majority of their supplies are sourced internationally.
Facilities and Equipment	60% of businesses own the facility in which they operate.
	Of those businesses that lease their facility, 61% intend to renew the current lease agreement.
	57% of businesses plan to expand within three years, and about half of those planning an expansion indicate that their current site will be adequate to accommodate expansion plans.
	The most commonly cited constraint on business operations was finance related, with lack of skilled staff, and identifying and accessing new markets also cited.
Business Climate	The most frequent rating of the local business climate was 'Fair'.
	A lack of steady work, high taxes and resistance to change were the most frequently cited barriers to growth.
	Businesses would like to see retail stores and grocery stores locate in Kimberley.

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:

Business Development

The businesses operating in Kimberley have a wide range of experience, with a significant number of businesses that are relatively new. Support to businesses that are in the growing/establishing phase could be explored. A focus on specific supports to small businesses is also supported by the research findings, as 60% of businesses report that they have less than 5 employees, and 40% report annual sales between $100,000 and $499,999.

Business Climate

Gaining an understanding of the factors that are attributed to a business climate most commonly rated as 'fair' could assist in improving the business climate. The majority of businesses forecast that the business climate will improve over the next five years. A proactive, planned approach to address concerns and issues will ensure that the business climate does improve over time. Actions in this area could include hosting business to business forums and stakeholder meetings with targeted groups to identify barriers and constraints and identify actions.

Business Growth & Expansion

52% of businesses in the region report being in a growth cycle, and 57% indicate that they are planning to expand within the next three years. Half of those businesses planning to expand feel their existing site is adequate, and the majority of expansion plans are expected to occur within the community. Businesses also report that sales are increasing. This data coupled with the general optimism for the future provides a positive picture of local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of assistance with navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Economic Diversification

A lack of diversification is suggested by[1] a relatively high percentage (38%) of businesses engaged in the retail and wholesale trade sector. In addition, 32% of businesses indicated that they purchase their supplies from international suppliers. Increasing other sectors of the economy will assist in increasing the resilience of the City of Kimberley in the future. Actions to increase diversification could include working with local businesses to expand their customer base, identifying local suppliers for businesses, and raising awareness of small business support programs from groups such as Community Futures East Kootenay (i.e. financing, Business Basin Advisors program). Continued collaboration between government and local businesses towards a diversified economy will be key to achieving results in this area.

---

[1] Cross-referencing the sample with the business license database could further illuminate the possible reliance on this sector.

TABLE OF CONTENTS

List of Figures

Project Overview

This report describes findings from a Business Retention and Expansion (BRE) survey[2] conducted in the City of Kimberley during the Spring and Summer of 2013, as well as surveys of Kimberley based businesses completed as part of the 2013 report on Manufacturing and Technology Sectors. The Economic Development Officer with the City of Kimberley acted as the community lead for the project; the City contracted the Kimberley and District Chamber of Commerce to administer the survey and enter data into the BC Business Counts online database. 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 Kimberley 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.

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

Research Considerations

The BRE Survey

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

The base survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey.

The City of Kimberley and the Chamber of Commerce adapted the base survey to administer a survey of 28 questions. Some of the 28 questions included a substantial re-interpretation of the common BRE questionnaire. Those businesses interviewed as part of the Manufacturing and Technology Sectors report were asked the entire base survey and the additional region-specific questions. Only those questions compatible with the regional BRE initiative are included in this report.

Data collected through this project that is not compatible with the regional BRE initiative will not be used in any future sub-regional, regional or provincial level analysis.

The Data Set

The business license database managed by the City of Kimberley was used to generate an initial set of potential research participants

Invitations to participate were extended to businesses via personal phone calls by the Chamber Manager, during which time interviews were arranged.

Businesses were surveyed through individual face-to-face interviews. In total 51 respondents from Kimberley participated in the modified BRE survey. The number of responses to each question varies depending on whether businesses felt comfortable sharing all of the information requested.

Nine respondents were interviewed as part of the report for the Manufacturing and Technology Sectors and are included in this report.

Data Collection

The Chamber Manager was solely responsible for the entire survey process. This 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 Chamber Manager immediately following the interviews. To ensure confidentiality and data security, company-level data was only made accessible to RDI staff, the Economic Development Officer with City of Kimberley, and the Manager of the Chamber of Commerce.

Quantitative data was analysed using descriptive statistics and qualitative data were analysed using the grounded theory method of generating key coding themes. Based on the results of data analysis activities, an initial set of next steps and possible actions was generated by RDI. Findings and related next steps were assembled into this report by RDI researchers in consultation with the Kimberley BRE Lead.

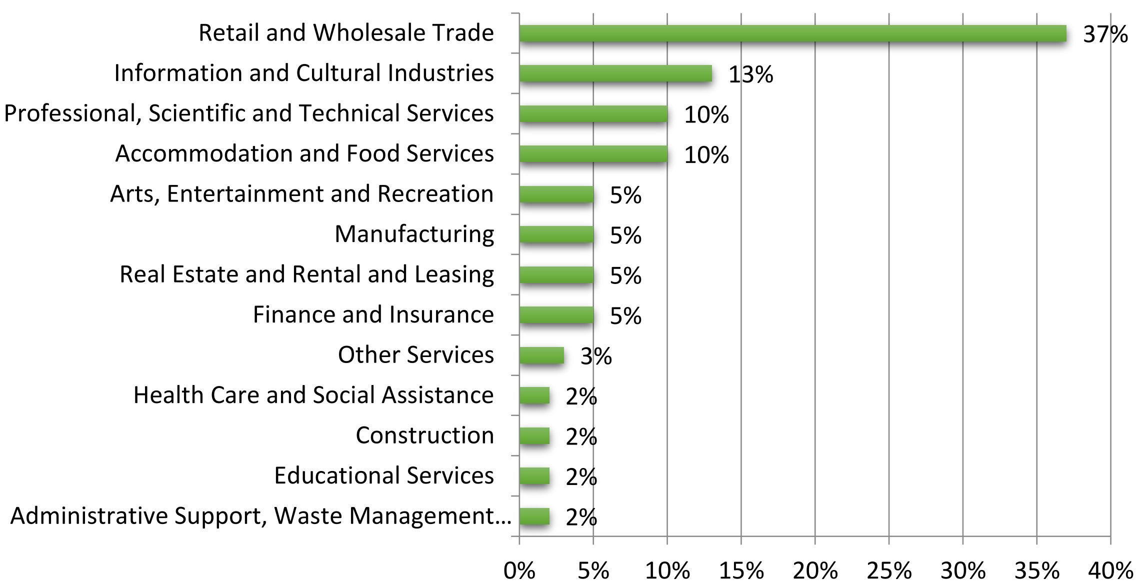
Research Findings

Company Information

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Retail and Wholesale Trade (37% or 22 respondents), Information and Cultural Industries (13% or 8 respondents), Professional, Scientific and Technical Services (10% or 6 respondents), and Accommodation and Food Services (10% or 6 respondents).

Figure 1: Industry classification

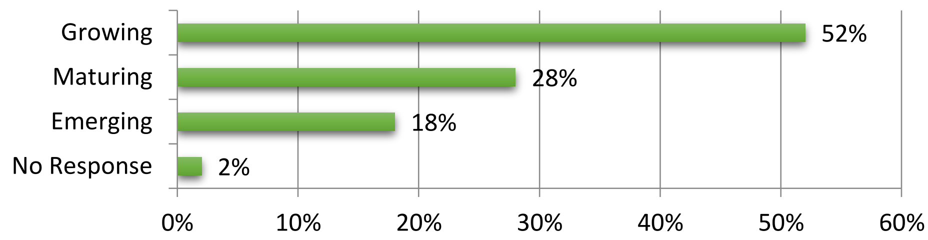


Note: 60 respondents

Age and Life Cycle Stage

Over half of respondents (52% or 31 businesses) reported that their business is in the 'growing' life cycle stage. Another 28% (17 businesses) indicated that their business is in the 'maturing' stage. 18% (11 businesses) indicated that they are in the 'emerging' stages, and no businesses indicated that they were declining.

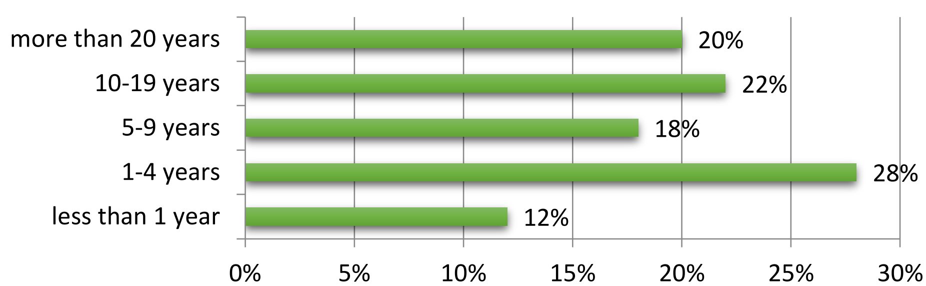
Figure 2: Life cycle stage



Note: 60 respondents

Most businesses (11 respondents or 28%) reported that they have been in business for between one and four years. Significant numbers reported that they have been in business for more than 20 years (20% or 12 respondents), between 10 and 19 years (22% or 13 respondents) and between five and nine years (18% or 11 businesses). Only 12% (7 respondents) indicated they have been in business for less than one year.

Figure 3: Length of time in business

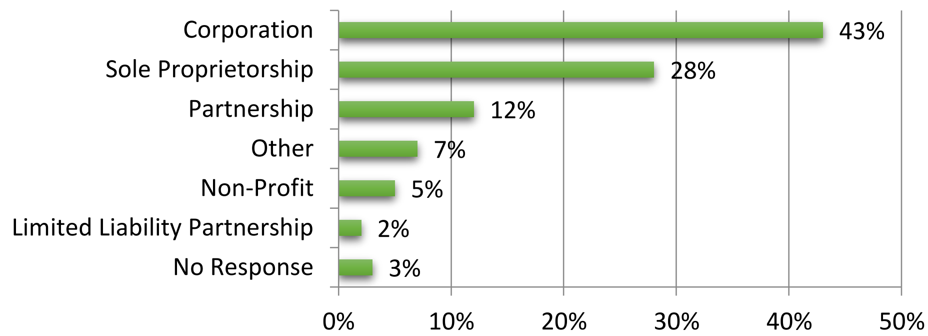


Note: 60 respondents

Ownership and Management

Most respondents (26 respondents or 43%) indicated that their business is classified as a corporation, while 28% (17 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (7 respondents), non-profit (3 respondents), other type of business (4 respondents), or limited liability partnership (1 respondent).

Figure 4: Type of business

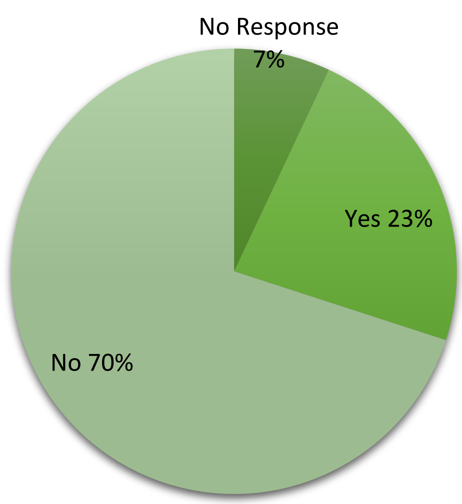


Note: 60 respondents

Succession and Business Plans

14 businesses (23%) are expecting an ownership change within the next 10 years.

Figure 5: Pending Ownership Change



Note: 60 respondents

Of the 14 businesses that responded and reported a pending ownership change, one expects the change will happen in three or more years.

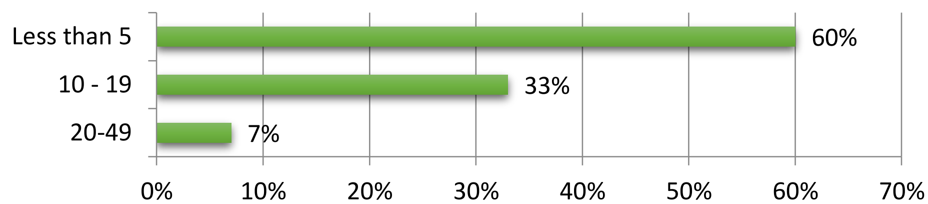
14% of respondents (2 respondents) expect that the current owner will sell or transfer the business to either a family member of non-family member. 21% (3 respondents) indicated that they might look to liquidate assets, seek a business partner to arrange success, or sell the building.

Local Workforce

Size of Workforce

The 60 businesses interviewed reported a total of 329 employees. 60 % of the businesses (36 businesses) surveyed indicated that they have less than five employees and 7% (4 businesses) indicated that they have between 20 and 49 employees. No businesses reported having over 50 employees.

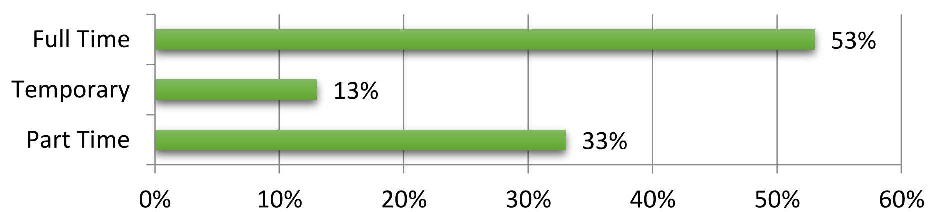
Figure 6: Total number of employees



Note: 60 respondents

53% (176) of employment positions at surveyed businesses are full-time, while 33% (110) are part-time and 13% (43) are temporary.

Figure 7: Nature of employment



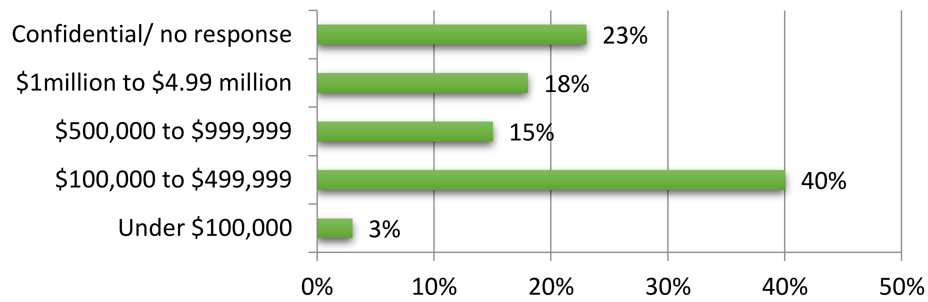
Note: 60 respondents

Sales

Market Size and Share

The highest number of respondents (24 businesses or 40%) reported annual sales between $100,000 and $499,999. The second highest number of respondents (11 businesses or 18%) reported annual sales between $1 million and $4.99 million. The lowest number (2 businesses or 3%) reported sales of under $100,000. 23% (14 businesses) of respondents did not share annual sales information.

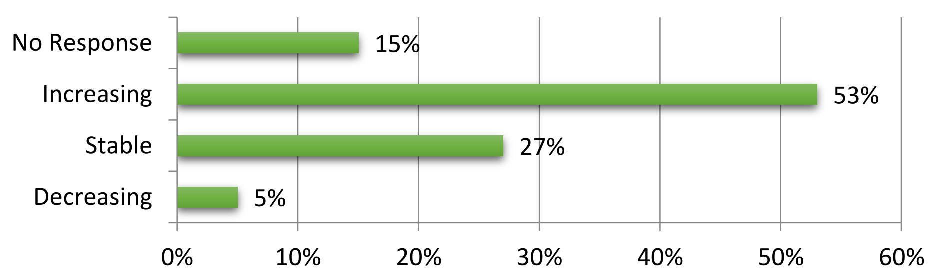
Figure 8: Annual sales



Note: 60 respondents

The majority of businesses interviewed (53% or 32 businesses) indicated that the size of the market for their product or service is increasing. Another 27% (16 businesses), reported that the market is stable.

Figure 9: Status of market for product/service

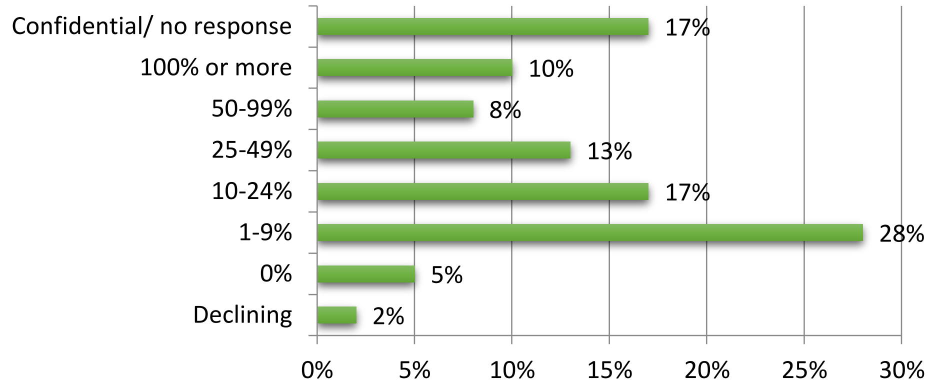


Note: 60 respondents

Growth

28% of respondents (17 businesses) expect to see low growth in sales in the realm of 1 – 9%. Moderate growth in sales of 10-24% over the next year is projected by 17% of respondents (10 businesses). Strong growth is expected by 8% (5 businesses) in the realm of 50 – 99% and 10% of businesses (6 businesses) expect to see 100% growth or more next year. 5% (3 businesses) of respondents expect their sales to remain stagnant, while a further 2% (1 business) expects sales to decline.

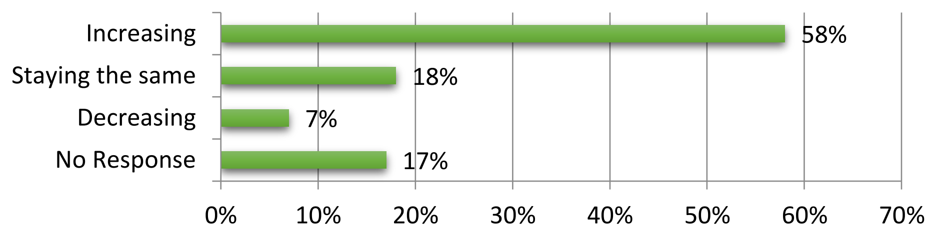
Figure 10: Projected sales growth in the next year



Note: 60 respondents

The majority of responses (58% or 35 businesses) indicated that sales at their business have increased over time, 18% (11 businesses) indicated that sales have remained relatively stable and 7% (4 businesses) reported that sales have declined.

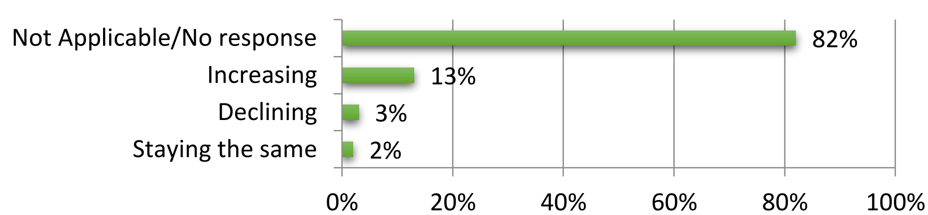
Figure 11: Historic sales trend over last 10 years at this location



Note: 60 respondents

Data indicates that the sales trend at parent companies approximates the sales trends at this location. 13% or 8 businesses reported that sales at their parent company have historically increased and only 3% (2 businesses) reported that they have declined, while 2% or 1 business reported stable historic sales trends.

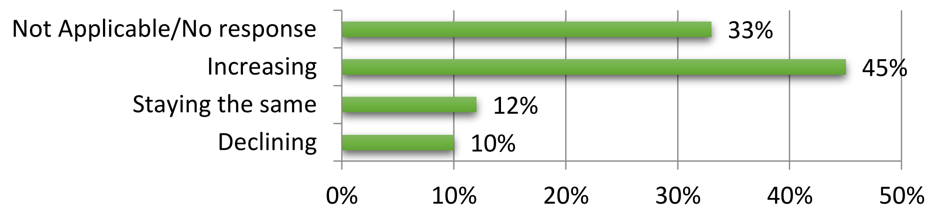
Figure 12: Historic sales trend over last 10 years at parent company



Note: 60 respondents

Data indicates that the sales trend within respondents' respective industries has roughly followed the sales trend reported for parent company's. 45% percent of respodents (27 businesses) reported that sales within their industry have been increasing while 10% (6 businesses) reported that they have been decreasing.

Figure 13: Historic sales trend over last 10 years within the industry

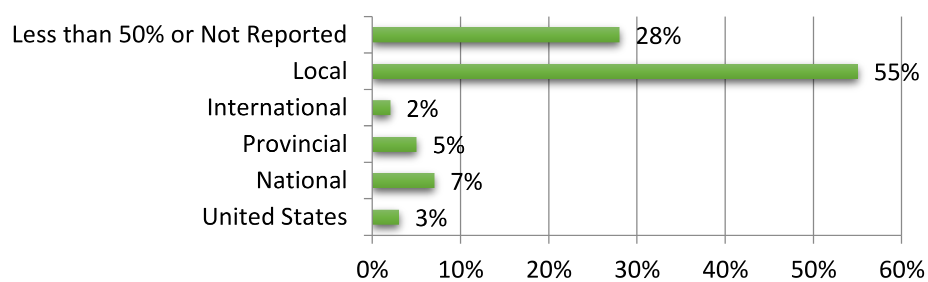


Note: 60 respondents

Source of Sales

A majority of respondents (55%) indicated that over 50% of their sales are to customers within the community or region. 7% indicated that over 50% of their sales are within the country. Fewer respondents (5%, 3%, 2%) indicated that the majority of their sales are to provincial, US or international markets, respectively.

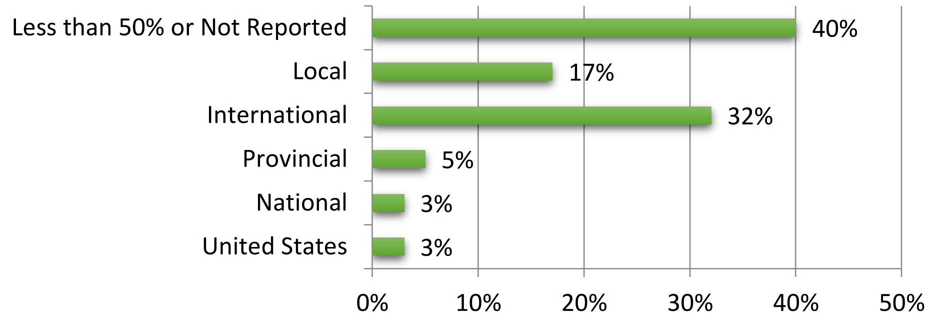
Figure 14: Geographic source of majority of sales



Note: 60 respondents

17% of respondents (10 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 32% (19 businesses) indicated that the majority of their supplies come from international businesses.

Figure 15: Geographic source of majority of supplies

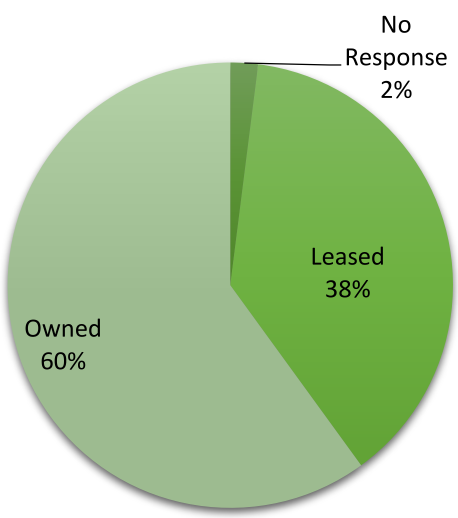


Note: 60 respondents

Facilities and Equipment

Ownership

Figure 16: Ownership status of facility

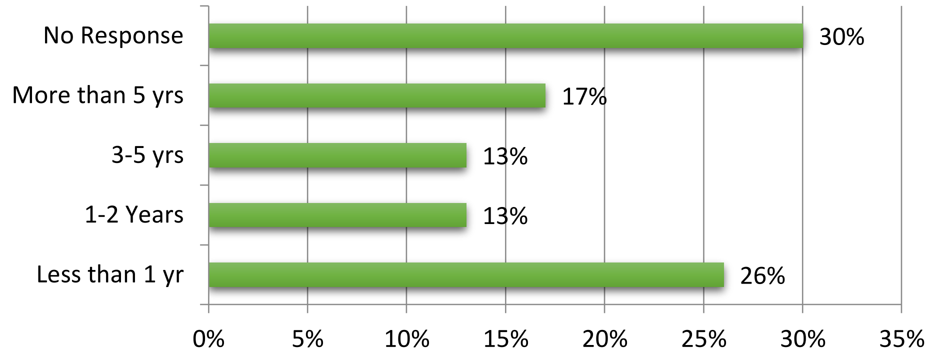


60% of respondents (36 businesses) own the facility in which they operate and 38% (23 businesses) lease it.

Note: 60 respondents

Of the 23 businesses that lease their facility, 26% have less than a year remaining on their lease and 13% have between 3 and 5 years remaining. The majority of respondents that lease their facility (61% or 14 businesses) intend to renew their current lease agreement.

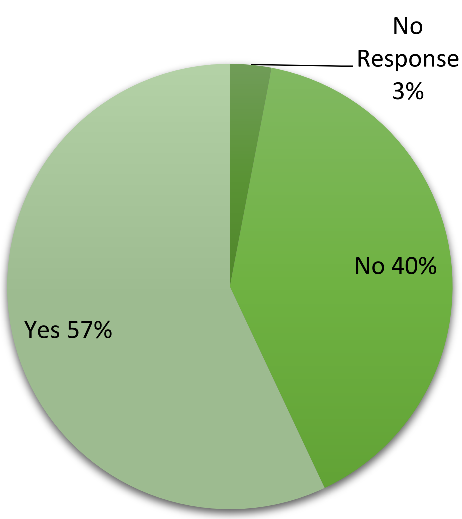
Figure 17: Length of time remaining on lease



Note: 23 respondents

Facility Expansion

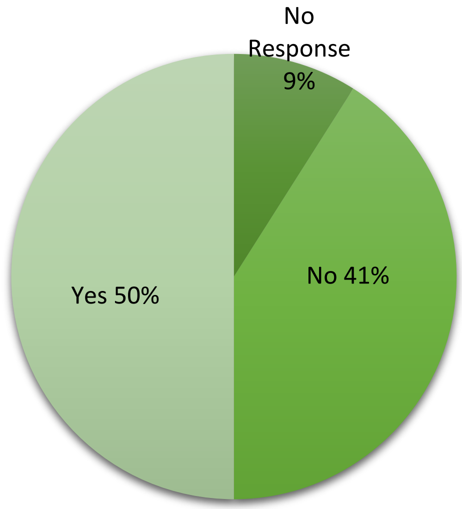
Figure 18: Plans to expand within three years



57% of respondents (34 businesses) plan to expand within three years, 40% (24 businesses) do not.

Note: 60 respondents

Figure 19: Adequacy of current site to support expansion

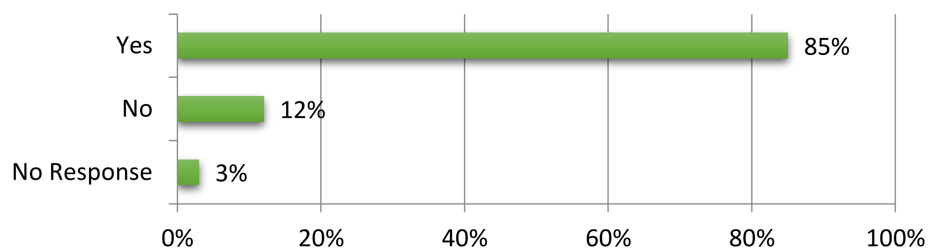


Of the 34 businesses planning expansion, 50% (17 businesses) reported that their current site will be adequate. Notably however, 41% (14 businesses) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 34 respondents

Most respondents (85% or 29 businesses) indicated that expansion will occur within the community.

Figure 20: Expansion to occur in community

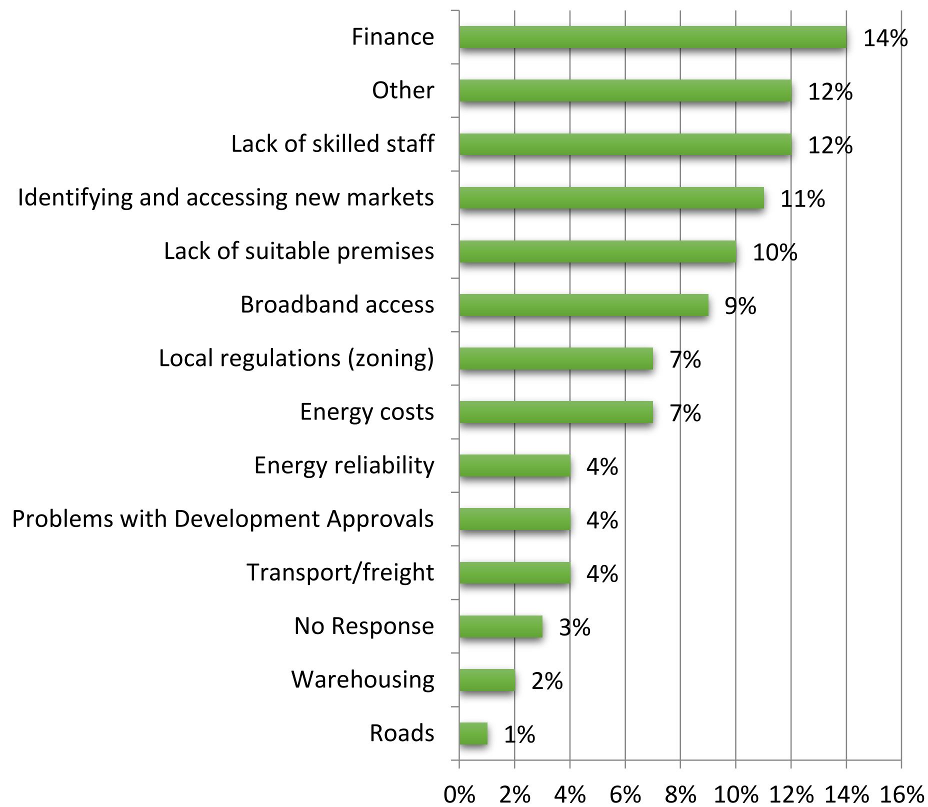


Note: 34 respondents

Business Operations

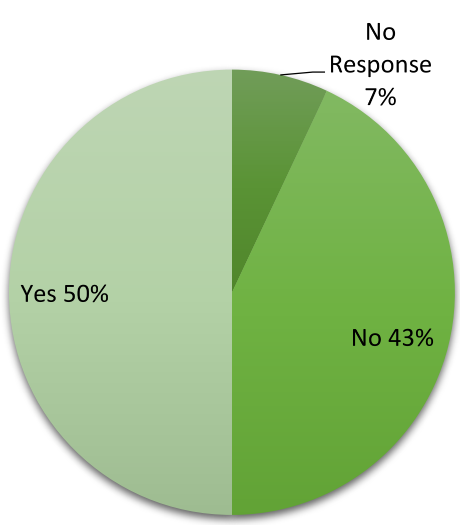
The most commonly cited constraint on business operations was finance related (14% or 13 businesses). A lack of skilled staff (12% or 11 businesses) and identifying and accessing new markets (11% or 10 businesses) were both frequently cited. All “other” responses are found in Appendix A.

Figure 21: Constraints on business operations



Note: 60 respondents

Figure 22: Energy efficiencies factored into business operations



50% of respondents (30 businesses) indicated that they do factor energy efficiency improvements into their business operations.

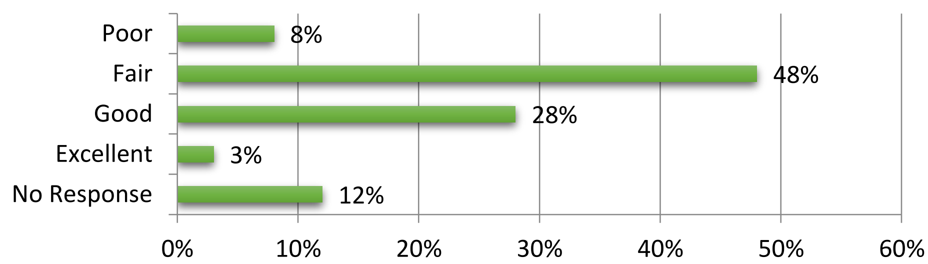
Note: 60 respondents

Business Climate

Quality of Business Climate

The majority of respondents rated the overall business climate as fair (48% or 29 businesses).

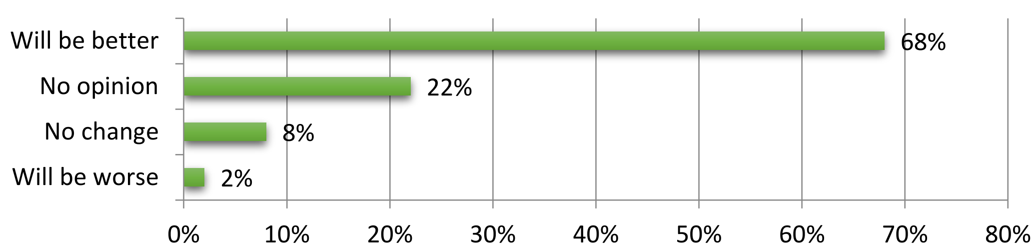
Figure 23: Rating of local business climate



Note: 60 respondents

68% of businesses (41 businesses) forecasted that the local business climate will be better five years from today.

Figure 24: Forecast of the local business climate

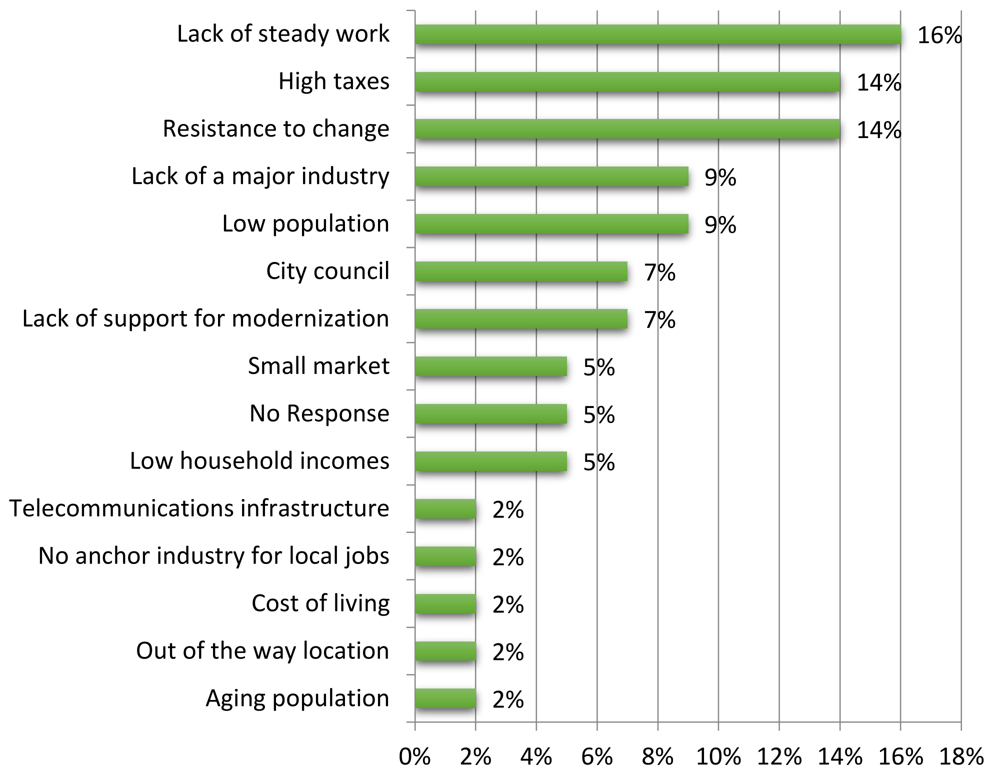


Note: 60 respondents

Business Growth

72% of respondents (43 businesses) indicated that there are barriers to growth. The highest number of respondents (16% or 7 businesses) stated that a lack of steady work is an important barrier to growing the community's economy. Other commonly cited barriers include high taxes and resistance to change (14% or 6 businesses).

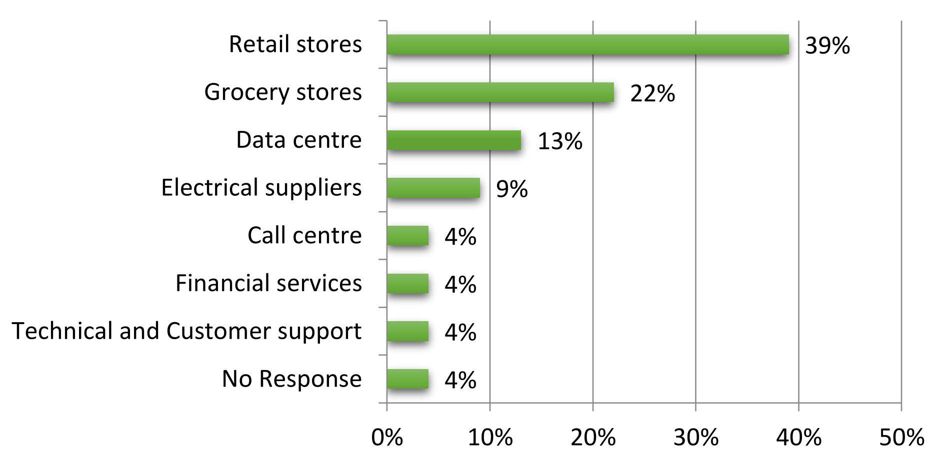
Figure 25: Barriers to growth in the community



Note: 43 respondents

42% of respondents (25 businesses) indicated that there are suppliers that could locate in the region. Retail stores was most commonly cited by 39% of respondents (9 businesses), with grocery stores being mentioned by 22% (5 businesses).

Figure 26: Potential Suppliers



Note: 25 respondents

Next Steps

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

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

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

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

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

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

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

1. Continually communicate (through press, presentations, electronic media, etc.) with the business community regarding actions and be clear that the actions are tied to the BRE process.
2. Establish a task force or steering 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 and evaluation program to assess the impact of implementation efforts.

Potential Action Areas

Business Development

The businesses operating in Kimberley have a wide range of experience, with a significant number of businesses that are relatively new. Support to businesses that are in the growing/establishing phase could be explored. A focus on specific supports to small businesses is also supported by the research findings, as 60% of businesses report that they have less than 5 employees, and 40% report annual sales between $100,000 and $499,999.

Business Climate

Gaining an understanding of the factors that are attributed to a business climate most commonly rated as ‘fair’ could assist in improving the business climate. The majority of businesses forecast that the business climate will improve over the next five years. A proactive, planned approach to address concerns and issues will ensure that the business climate does improve over time. Actions in this area could include hosting business to business forums and stakeholder meetings with targeted groups to identify barriers and constraints and identify actions.

Business Growth & Expansion

52% of businesses in the region report being a growth cycle, and 57% indicate that they are planning to expand within the next three years. Half of those businesses planning to expand feel their existing site is adequate, and the majority of expansion plans are expected to occur within the community. Businesses also report that sales are increasing. This data coupled with the general optimism for the future provides a positive picture of local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of assistance with navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Economic Diversification

A lack of diversification is suggested by[3] a relatively high percentage (38%) of businesses engaged in the retail and wholesale trade sector. In addition, 32% of businesses indicated that they purchase their supplies from international suppliers. Increasing other sectors of the economy will assist in increasing the resilience of the City of Kimberley in the future. Actions to increase diversification could include working with local businesses to expand their customer base, identifying local suppliers for businesses, and raising awareness of small business support programs from groups such as Community Futures East Kootenay (i.e. financing, Business Basin Advisors program). Continued collaboration between government and local businesses towards a diversified economy will be key to achieving results in this area.

[3] Cross-referencing the sample with the business license database could further illuminate the possible reliance on this sector.

Appendix A: Data Tables

Company Information

Figure 1:Industry Classification	NAICS Code	Count	Percent
Administrative Support, Waste Management and Remediation	56	1	2%
Educational Services	61	1	2%
Construction	23	1	2%
Health Care and Social Assistance	62	1	2%
Other Services	81	2	3%
Finance and Insurance	52	3	5%
Real Estate and Rental and Leasing	53	3	5%
Manufacturing	31-33	3	5%
Arts, Entertainment and Recreation	71	3	5%
Accommodation and Food Services	72	6	10%
Professional, Scientific and Technical Services	54	6	10%
Information and Cultural Industries	51	8	13%
Retail and Wholesale Trade	41-45	22	37%
Total		60	100%

Survey Respondents: 60

Figure 2: Life cycle stage	Count	Percent
No Response	1	2%
Emerging	11	18%
Maturing	17	28%
Growing	31	52%
Total	60	100%

Survey Respondents: 60

Figure 3: Length of time in business	Count	Percent
less than 1 year	7	12%
1-4 years	17	28%
5-9 years	11	18%
10-19 years	13	22%
more than 20 years	12	20%
Total	60	100%

Survey Respondents: 60

Figure 4: Type of business	Count	Percent
No Response	2	3%
Limited Liability Partnership	1	2%
Non-Profit	3	5%
Other	4	7%
Partnership	7	12%
Sole Proprietorship	17	28%
Corporation	26	43%
Total	60	100%

Survey Respondents: 60

Figure 5: Pending ownership change	Count	Percent
No Response	4	7%
Yes	14	23%
No	42	70%
Total	60	100%

Survey Respondents: 60

LOCAL WORKFORCE

Figure 6: Total number of employees	Count	Percent
20-49	4	7%
10 - 19	20	33%
Less than 5	36	60%
Total	60	100%

Survey Respondents: 60

Total Employees: 329.0

Figure 7: Nature of Employment	Count	Percent
Part Time	110	33%
Temporary	43	13%
Full Time	176	53%
Total	329	100%

Survey Respondents: 60

Figure 7b: Number of Full-Time Employees	Count	Percent
20-49	2	3%
0 or no answer	3	5%
10-19	8	13%
Less than 5	47	78%
Total	60	100%

Survey Respondents: 60

Figure 7c: Number of Part-Time Employees	Count	Percent
0 or no answer	6	10%
10-19	7	12%
Less than 5	47	78%
Total	60	100%

Survey Respondents: 60

Figure 7d: Number of Temporary Employees	Count	Percent
19-Oct	2	3%
0 or no answer	8	13%
Less than 5	50	83%
Total	60	100%

Survey Respondents: 60

SALES

Figure 8: Annual Sales	Count	Percent
Under $100,000	2	3%
$100,000 to $499,999	24	40%
$500,000 to $999,999	9	15%
$1million to $4.99 million	11	18%
Confidential/ no response	14	23%
Total	60	100%

Survey Respondents: 60

Figure 9: Status of Market	Count	Percent
Decreasing	3	5%
Stable	16	27%
Increasing	32	53%
No Response	9	15%

Total	60	100%

Survey Respondents: 60

Figure 10: Projected Sales Growth in Upcoming Year	Count	Percent
Declining	1	2%
0%	3	5%
1-9%	17	28%
10-24%	10	17%
25-49%	8	13%
50-99%	5	8%
100% or more	6	10%
Confidential/ no response	10	17%
Total	60	100%

Survey Respondents: 60

Figure 11: Historical Sales Trend (at this Location)	Count	Percent
No Response	10	17%
Decreasing	4	7%
Staying the same	11	18%
Increasing	35	58%
Total	60	100%

Survey Respondents: 60

Figure 12: Historical Sales Trend (at the Parent Company)	Count	Percent
Staying the same	1	2%
Declining	2	3%
Increasing	8	13%
Not Applicable/No response	49	82%
Total	60	100%

Survey Respondents: 60

Figure 13: Historical Sales Trend (within the Industry)	Count	Percent
Declining	6	10%
Staying the same	7	12%
Increasing	27	45%
Not Applicable/No response	20	33%
Total	60	100%

Survey Respondents: 60

Figure 14: Geographic Source of Majority of Sales	Count	Percent
United States	2	3%
National	4	7%
Provincial	3	5%
International	1	2%
Local	33	55%
Less than 50% or Not Reported	17	28%
Total	60	100%

Survey Respondents: 60

Figure 14b: Source of Sales (Local/Regional)	Count	Percent
100%	8	13%
under 50%	13	22%
0% or no answer	14	23%
50-99%	25	42%
Total	60	100%

Survey Respondents: 60

Figure 14c: Source of Sales (Provincial)	Count	Percent
50-99%	3	5%
0% or no answer	23	38%
under 50%	34	57%
Total	60	100%

Survey Respondents: 60

Figure 14d: Source of Sales (National)	Count	Percent
100%	1	2%
50-99%	3	5%
under 50%	24	40%
0% or no answer	32	53%
Total	60	100%

Survey Respondents: 60

Figure 14e: Source of Sales (United States)	Count	Percent
50-99%	2	3%
under 50%	19	32%

0% or no answer	39	65%
Total	60	100%

Survey Respondents: 60

Figure 14f: Source of Sales (International)	**Count**	**Percent**
50-99%	1	2%
under 50%	15	25%
0% or no answer	44	73%
Total	60	100%

Survey Respondents: 60

Figure 15: Source of Majority of Supplies	**Count**	**Percent**
United States	2	3%
National	2	3%
Provincial	3	5%
International	19	32%
Local	10	17%
Less than 50% or Not Reported	24	40%
Total	60	100%

Survey Respondents: 60

Figure 15b: Source of Supplies (Local/Regional)	**Count**	**Percent**
under 50%	6	10%
50-99%	10	17%
0% or no answer	44	73%
Total	60	100%

Survey Respondents: 60

Figure 15c: Source of Supplies (Provincial)	**Count**	**Percent**
50-99%	3	5%
under 50%	11	18%
0% or no answer	46	77%
Total	60	100%

Survey Respondents: 60

Figure 15d: Source of Supplies (National)	**Count**	**Percent**
50-99%	2	3%
under 50%	12	20%

0% or no answer	46	77%
Total	60	100%

Survey Respondents: 60

Figure 15e: Source of Supplies (United States)	Count	Percent
50-99%	2	3%
under 50%	6	10%
0% or no answer	52	87%
Total	60	100%

Survey Respondents: 60

Figure 15f: Source of Supplies (International)	Count	Percent
under 50%	4	7%
100%	7	12%
50-99%	12	20%
0% or no answer	37	62%
Total	60	100%

Survey Respondents: 60

Facilities and Equipment

Figure 16: Ownership Status	Count	Percent
No Response	1	2%
Leased	23	38%
Owned	36	60%
Total	60	100%

Survey Respondents: 60

Figure 17: Length of Time Remaining on Lease	Count	Percent
Less than 1 yr	6	26%
1-2 Years	3	13%
3-5 yrs	3	13%
More than 5 yrs	4	17%
No Response	7	30%
Total	23	100%

businesses that lease: 23.0

Figure 17b: Planning to renew current lease	Count	Percent
No	4	17%
No Response	5	22%
Yes	14	61%
Total	23	100%

Businesses that lease: 23.0

Figure 18: Expansion Plans (Does the company plan to expand in the next three years?)	Count	Percent
No Response	2	3%
No	24	40%
Yes	34	57%
Total	60	100%

Survey Respondents: 60

Figure 19: Adequacy of Current Site for Expansion	Count	Percent
No Response	3	9%
No	14	41%
Yes	17	50%
Total	34	100%

Respondents planning to expand: 34

Figure 20: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent
No Response	1	3%
No	4	12%
Yes	29	85%
Total	34	100%

Survey Respondents answering Yes to "Does the company plan to expand in the next three years?" : 34

Figure 21: Constraints on business operations	Count	Percent
Roads	1	1%
Warehousing	2	2%
No Response	3	3%
Transport/freight	4	4%
Problems with Development Approvals	4	4%
Energy reliability	4	4%
Energy costs	6	7%
Local regulations (zoning)	6	7%
Broadband access	8	9%
Lack of suitable premises	9	10%
Identifying and accessing new markets	10	11%
Lack of skilled staff	11	12%
Other	11	12%
Finance	13	14%
Total	92	100%

Respondents:60

Figure 21b: What, if any, are the major constraints on business operations? (Please check all that are applicable): Other (please specify)	Count	Percent
City removing snow	1	9%
Communications between city and us.	1	9%
Gerry Sorenson Way (Ski Hill Road)	1	9%
Lack of (local) business support	1	9%
No interest in managing employees (future growth)	1	9%
Property taxes for businesses	1	9%

Provincial Liquor licensing	1	9%
Small and Home Business Training	1	9%
Taxation	1	9%
sourcing of material and packaging lack of Canadian packaging distributors.	1	9%
the economy	1	9%
Total	11	100%

Survey Respondents "Other": 11

Figure 22: Energy efficiencies factored into business operations	Count	Percent
No Response	4	7%
No	26	43%
Yes	30	50%
Total	60	100%

Survey Respondents: 60

BUSINESS CLIMATE

Figure 23: Please rate the local business climate	Count	Percent
No Response	7	12%
Excellent	2	3%
Good	17	28%
Fair	29	48%
Poor	5	8%
Total	60	100%

Survey Respondents: 60

Figure 24: Business Climate 5 Years from Today	Count	Percent
Will be worse	1	2%
No change	5	8%

No opinion	13	22%
Will be better	41	68%
Total	60	100%

Survey Respondents: 60

Figure 25: Barriers to Growth in Community	**Count**	**Percent**
Aging population	1	2%
Out of the way location	1	2%
Cost of living	1	2%
No anchor industry for local jobs	1	2%
Telecommunications infrastructure	1	2%
Low household incomes	2	5%
No Response	2	5%
Small market	2	5%
Lack of support for modernization	3	7%
City council	3	7%
Low population	4	9%
Lack of a major industry	4	9%
Resistance to change	6	14%
High taxes	6	14%
Lack of steady work	7	16%
Total	44	100%

Yes Survey Respondents: 43

Figure 25b: Barriers to Growth in Community	**Count**	**Percent**
No Response	6	10%
No	11	18%
Yes	43	72%
Total	60	100%

Survey Respondents: 60

Figure 26: Are there suppliers you think could locate in this region?	**Count**	**Percent**
No	14	23%

No Response	21	35%
Yes	25	42%
Total	60	100%

Survey Respondents: 60

Figure 26b: Are there suppliers you think could locate in this region?: If Yes, please list	**Count**	**Percent**
No Response	1	4%
Technical and Customer support	1	4%
Financial services	1	4%
Call centre	1	4%
Electrical suppliers	2	9%
Data centre	3	13%
Grocery stores	5	22%
Retail stores	9	39%
Total	23	100%

Yes Survey Respondents: 25