



COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON NELSON BUSINESSES
WINTER 2015



COLUMBIA BASIN
RDI
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The Nelson Business Retention and Expansion project is a community-driven effort undertaken by the Nelson and Area Economic Development Partnership focused on identifying the needs of our existing businesses. The Nelson and Area Economic Development Partnership is a partnership between the City of Nelson, Community Futures Central Kootenay, the Nelson and District Chamber of Commerce, and RDCK Areas E and F. The partnership's goal is to take a unified approach to community economic development initiatives for the city and region.

EXECUTIVE SUMMARY

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

KEY RESEARCH FINDINGS

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Professional, Scientific and Technical Services' and 'Manufacturing' under the North American Industry Classification system.
	Lifestyle was the most frequently cited reason given for businesses to locate in Nelson.
	Most companies surveyed have been in business for more than 20 years.
	Just over half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 2,498 employees.
	The majority of employees are full-time.
	The most commonly hired employee category is 'service worker'.
	Sales/Marketing and Computer Skills were most commonly listed as key training and Professional Development areas.
	The most critical considerations for employees is the cost of living and housing.
Sales	The majority of businesses indicated the market for their product/service is increasing.
	68% of businesses report that their sales are to customers within the community or region.
	The most frequent reason for purchasing products or services outside of the area is that the product is not available locally.
Facilities and Equipment	51% of businesses own the facility in which they operate.
	Just over half of businesses plan to expand within 3 years, with the majority indicating that expansion will occur within the community.
	Top barriers to expansion are financing and lack of suitable premises.
Government Services	Top rated government services include access to and availability of road transport services. The lowest ratings include access to airport facilities, disposal of waste materials and availability of buildings for lease or purchase.
	Improvements to airport service and expansion of electronic communication service are the government services most in need of improvement.
	The West Kootenay Regional Airport (Castlegar) is the most used airport by local businesses.
Business Climate	The overall business climate was rated as good, 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/recreational amenities and Community Futures.
	Tourism and technology businesses were most commonly cited as sectors, businesses, or industries that could be attracted to the region.
	The business competitiveness factors that are most important to respondents include workforce skill development, availability of telecommunications infrastructure and services, and improvement of customer service.
Assessment and Plans	The overall health of their company was rated as good by 59% of businesses, and excellent by 25% of businesses.
	Fewer than 5% of businesses are at a high risk of closing or 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:

Workforce – Recruitment & Retention

With 41% of businesses indicating that they currently face recruitment challenges, 38% anticipating future difficulties, and 29% of businesses stating they did not engage in any recruitment activities, there is an indication that actions to support and expand recruitment efforts, and education/training on recruitment techniques could prove helpful.

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. Increasing youth employment may assist in addressing the recruitment challenges that 41% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions. Note that 67% of businesses indicated their willingness to support workforce development efforts.

Business Growth & Expansion

52% of businesses in the region report being in a growth cycle and 35% are maturing. 51% indicate that they are planning to expand within the next three years. Businesses also report that employment rates are stable or increasing, and that they anticipate continued stability or an increase to the amount of full-time employment over the next three years. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Support could come in the form of assistance with navigating local regulations, identifying and securing new sites, exploring financing options, and connecting businesses with resources to assist in expansion projects. These potential actions and any others, should be designed to address the stated barriers to expansion which include financing and lack of suitable premises. It is worth noting that very few (25%) businesses sought assistance with expansion efforts from an external organisation.

Small and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small (46% have fewer than five employees, are located in a facility that is less than 1,000 sq. ft., and 31% have annual sales of \$100,000 to \$499,999), and independent (just 15% have other locations). Tailoring supports and services to small, independent businesses will benefit businesses in the Nelson area.

Supply Sourcing and Procurement

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

Local businesses do not appear to engage actively with government procurement processes, with only 29% of businesses indicated that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

Businesses identified a need for training in the areas of sales/marketing, computer skills, and safety/first aid/food safe. 87% of businesses ranked workforce skill development as either somewhat or very important for ensuring business competitiveness. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with local educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 24% of respondents indicated that they have a formal succession plan and half have an up-to-date business plan. With 41% of businesses indicating that they have been in business for more than 20 years, succession planning is timely for many. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future 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.

Airport Service

A recurring theme was the poor access to airport facilities. In this case, the most frequently used airport is the West Kootenay Regional Airport in Castlegar. The most frequently requested

improvements to this airport are related to improving the reliability of flights, with 40% requesting improvements to navigational aids, and 35% requesting that flight reliability be improved. The most frequently cited community weakness was the geographic isolation. Geographic constraints were also cited as an important barrier to growing the community's economy. The difficulty accessing the area can be linked to the airport access issues. With tourism identified by 64% as the economic driver with greatest growth potential, as well as the most frequently cited sector that could be attracted to the region, reliable airport access is critical. Continued work on the issue of increased airport reliability is supported by the businesses surveyed as part of the BRE survey.

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PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey¹ conducted in the Nelson and surrounding area during the summer and fall of 2015. The Business Retention and Expansion Project Coordinator with the Nelson and Area Economic Development Partnership acted as the community lead for the project. The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

Funding for this project came from Columbia Basin Trust and the Ministry of Social Development and Social Innovation Labour Market Partnership.

The project was determined as a priority at the Nelson and Area Economic Development Partnership (NAEDP) strategic planning session in September 2015. The NAEDP strategic planning session is informed by the NAEDP Advisory Committee which includes members from the business community, Nelson & District Chamber of Commerce, Community Futures Central Kootenay, City of Nelson and RDCK Areas E & F (both staff and Board/Council).

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 Nelson and Area 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; and

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

5. To improve workforce data for Nelson.

RESEARCH CONSIDERATIONS

THE BRE SURVEY

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

The base survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey. The Labour Market specific questions were added to the base survey in order to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area. From the data collected strategies will be developed that will assist with building community capacity to respond to the identified barriers.

THE DATA SET

The geographic scope of the study area included the City of Nelson and Areas E and F within the Regional District of Central Kootenay.

To generate the initial set of potential research participants, the BRE Coordinator reviewed the local business license database, files from the previous 2010 BRE study, web searches and the phone book. As business licenses are not required for businesses located in Areas E and F within the Regional District of Central Kootenay, the Regional Directors and the Chair of the Balfour Historical Association assisted by providing a list of businesses and reaching out to their business networks to encourage participation. Additional businesses were identified through an independent online survey for home-based businesses initiated by a Nelson City Councilor. The online survey included a question asking participants if they would like to participate in the BRE survey.

Businesses were sorted on a spreadsheet by the business license type and by the North American Industry Classification System (NAICS) categories to ensure fair representation of each sector. Cross sections of businesses were randomly selected based on sector according to business license category, and the NAICS system, and responses from the online home-based business survey. Businesses who had self-identified as wanting to participate were automatically included in the cross section analysis.

173 businesses were emailed an initial invitation letter and received a follow up invitation by telephone or email. Researchers also conducted informal business walks in the Nelson downtown area to introduce the project, themselves, and to extend an invitation to participate. Those who were interested were emailed an invitation. The Coordinator promoted the BRE project during a morning show on Kootenay Co-op Radio. NAEDP distributed a press release to local media. In total, 100 of the businesses contacted by the researchers were surveyed for this project. 28 additional businesses responded but declined due to availability. The total response rate was 74%.

The data set also included twenty businesses from the Manufacturing and Technology Sector BRE project and seven businesses from the Metallurgical Sector survey, sponsored by Kootenay Association of Science and Technology (KAST).

DATA COLLECTION

Time and place of the interviews were arranged by phone, in person or by email. The structured interviews lasted approximately one to two and half hours to complete. Two interviews were conducted over the phone, 98 in person. The process in total took approximately four hours per business, including setting up interviews, the interview itself, data input, and any follow up if required.

In total three people conducted interviews: the contracted BRE Coordinator, Anni Holtby, of Holtby Consulting; the contracted Research Assistant, Savina Kelly; and Tom Thomson, Executive Director, Nelson and District Chamber of Commerce, a member of the NAEDP. The BRE process was coordinated in consultation with Lisa Cannady, the CFCK representative for NAEDP.

In addition KAST conducted twenty interviews during their manufacturing and technology sector survey and conducted seven interviews during their metallurgical sector survey.

DATA INPUT, ANALYSIS AND REPORTING

Data was entered into the ExecutivePulse system by the BRE Coordinator and the Assistant Researcher immediately following or within a day of the interview. To ensure confidentiality and data security, company-level data was only made accessible to the interviewers, the CFCK lead and RDI staff. The printed surveys and the company profile information were coded by a numbering system (1-100) and filed and locked in separate locations.

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 the RDI and then reviewed with a representative from NAEDP. Findings and related recommendations were assembled into this report by RDI researchers.

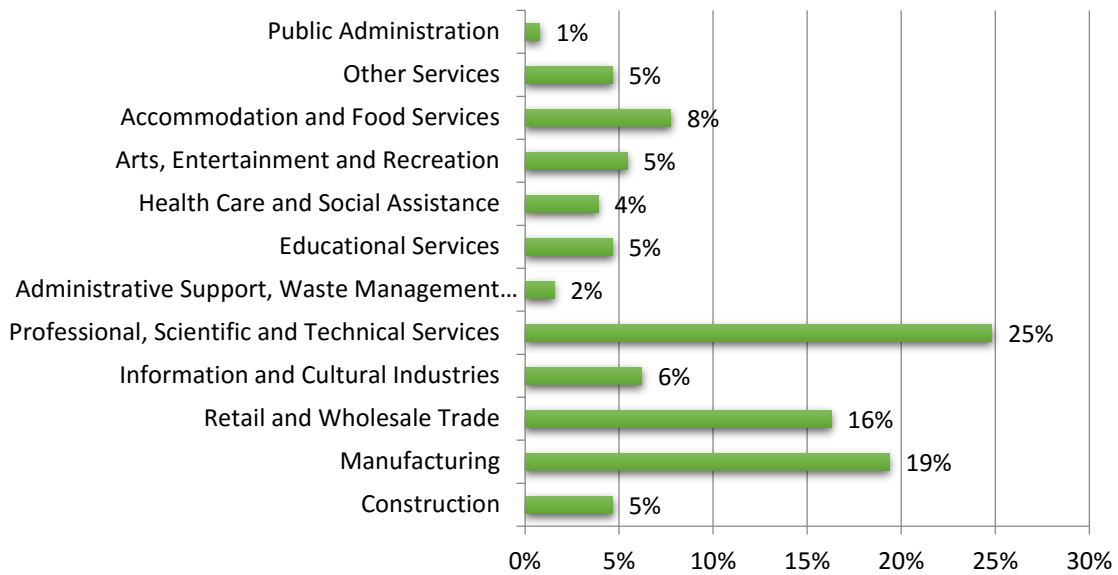
RESEARCH FINDINGS²

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Professional, Scientific and Technical Services (25% or 32 respondents), Manufacturing (19% or 25 respondents), and Retail and Wholesale Trade (16% or 21 respondents).

Figure 1: Industry classification



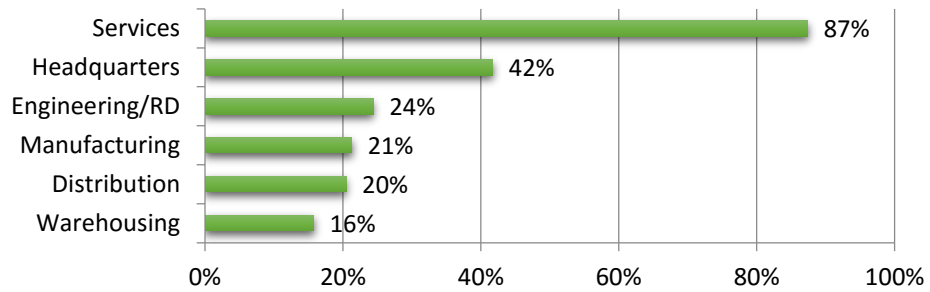
Note: 129 respondents

Facility Function

The majority of respondents (87% or 111 respondents) indicated that their facility provides services. Other primary functions include headquarters (42% or 53 respondents) and engineering/R&D (24% / 31 respondents). Fewer respondents indicated that their facility serves as warehousing, distribution and for manufacturing purposes.

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

Figure 2: Facility function(s)

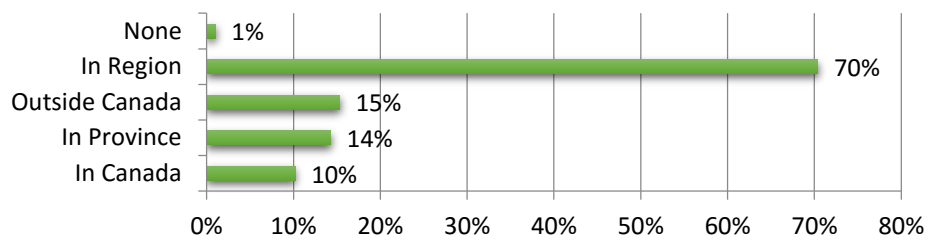


Note: 127 respondents

Competition

The vast majority of competition (70 % or 69 responses) reported was coming from within the regional area³.

Figure 3: Location of primary competitors



Note: 98 respondents

³ 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 cited customer service (18% or 23 businesses), with quality product / service (17 % or 22 businesses), and community support (15% or 19 businesses) also discussed frequently.

“It’s all about the people that work here - they are good at their job”

“People come to Baker Street to shop”

“Great pedestrian area - City and NAEDP support this”

“Success is not dependant on physical location”

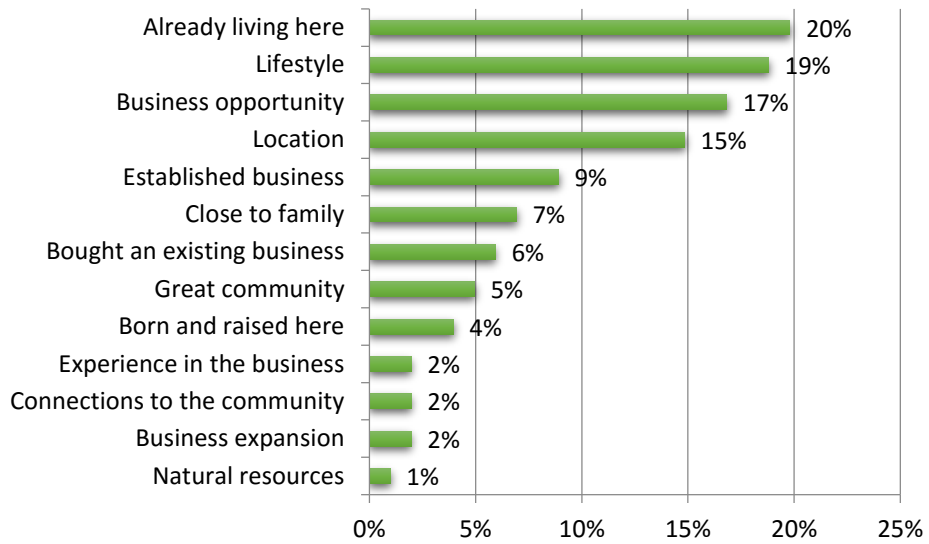
“Culture in Nelson, local support, remoteness; contributes to self-reliance for culture and entertainment”

“A focus on training people to work in rural communities”

Choosing Nelson

The majority of businesses indicated they were already living here when asked why they chose Nelson (20% or 20 respondents). Other factors cited include lifestyle (19% or 19 respondents) and the business opportunity (17% or 17 respondents).

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



Note: 101 respondents

Other Locations

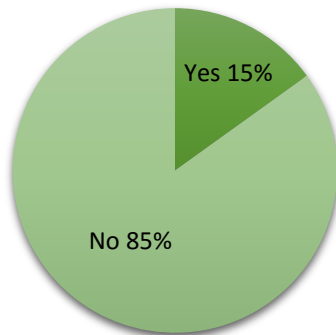


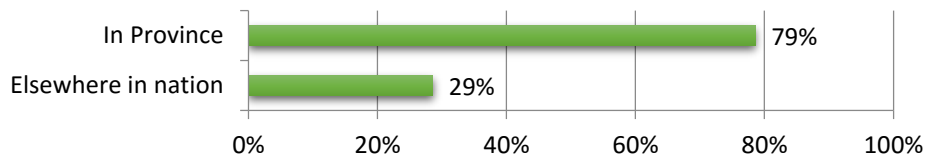
Figure 6: Other Locations

15% of respondents (19 respondents) indicated that their company has other locations.

Note: 126 respondents

79% of those other locations (11 respondents) are in other areas of the province, 29% (4 respondents) are in other parts of Canada.

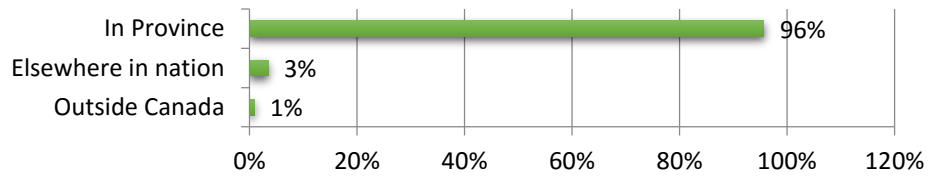
Figure 7: Location of Other Locations



Note: 14 respondents

96% (111 businesses) of respondents reported that their headquarters are located in British Columbia, 3% (4 businesses) indicated that they are headquartered elsewhere in Canada, and 1% (1 business) indicated that their headquarters are located in another country.

Figure 8: Location of headquarters

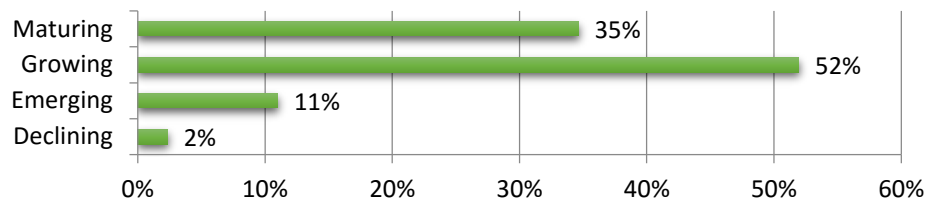


Note: 116 respondents

Age and Life Cycle Stage

Just over half of all respondents (52% or 66 respondents) reported that their business is in the 'growing' life cycle stage. Another 35% (44 businesses) indicated that their business is in the 'maturing' stage. Only 11% (14 businesses) indicated that they are in the 'emerging' stages, while 2% (3 businesses) indicated they were declining.

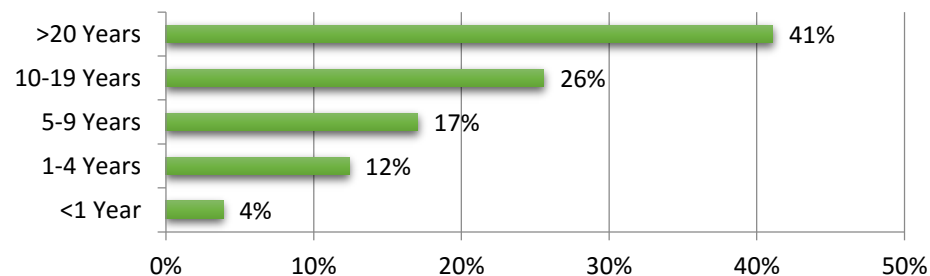
Figure 9: Life cycle stage



Note: 127 respondents

Most businesses (53 respondents or 41%) reported that they have been in business for more than 20 years. A significant number reported that they have been in business for 10 - 19 years (33 respondents or 26%) and 5 – 9 years (22 respondents or 17%).

Figure 10: Length of time in business

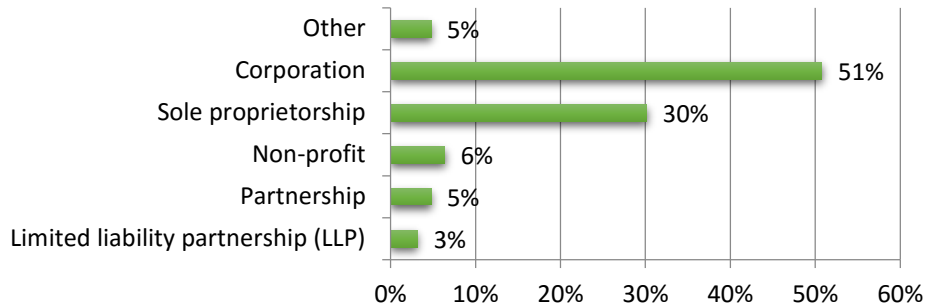


Note: 129 respondents

Ownership and Management

95% of all companies are privately owned, with just 5% publicly owned. Most respondents (64 respondents or 51%) indicated that their business is classified as a corporation, while 30% (38 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a non-profit (6% or 8 respondents), partnership (5% or 6 respondents), other type of business (5% or 6 respondents), or limited liability partnership (3% or 4 respondents).

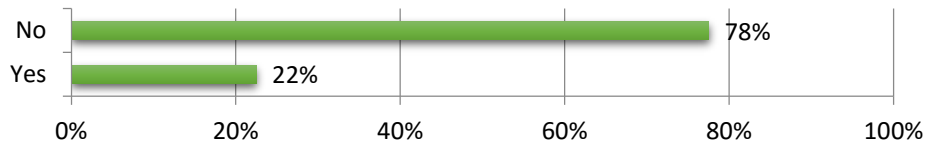
Figure 11: Type of business



Note: 126 respondents

78% of businesses (100 businesses) have not seen a management or ownership change in the last 5 years, while 22% of businesses (29 businesses) have changed management and/or ownership over that same period of time. 18% of businesses (23) are expecting an ownership change in the near future. Of the 29 respondents that have seen changes in management and or ownership, 90% (26 businesses) report that the change had a positive impact.

Figure 12: Ownership and management changes in last 5 years

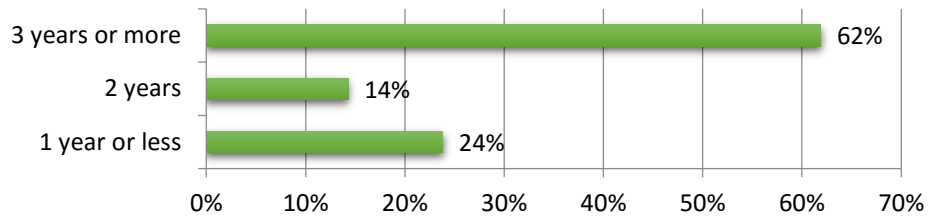


Note: 129 respondents

Succession and Business Plans

Of the 23 businesses (18%) that responded and reported a pending ownership change, 5 (24%) expect the change will happen in a year or less, and 3 (14%) expect the process to take 2 years, and 62% or 13 anticipate it taking 3 or more years.

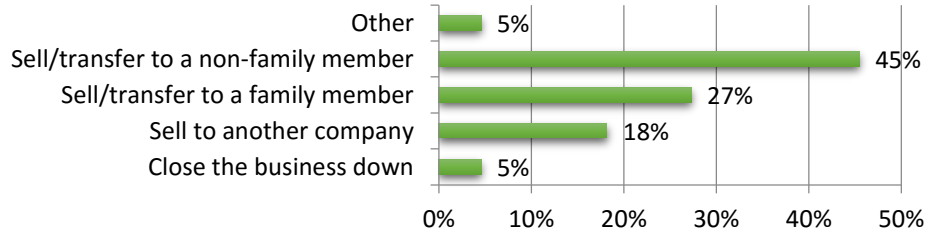
Figure 13: Anticipated timeline for ownership change



Note: 21 respondents

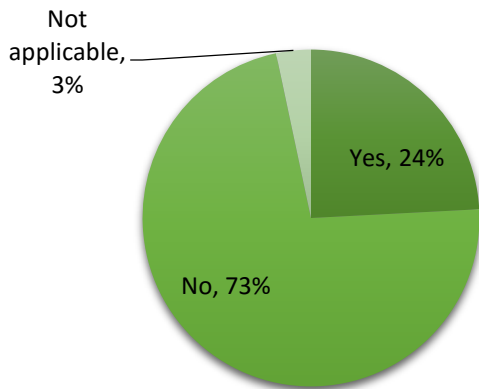
45% of respondents (10 respondents) expect that the current owner will exit the business by selling it to a non-family member, while 27% (6 respondents) expect it to be sold/transferred to family member. 5% (1 business) expect to close the business.

Figure 14: Anticipated exit strategy



Note: 22 respondents

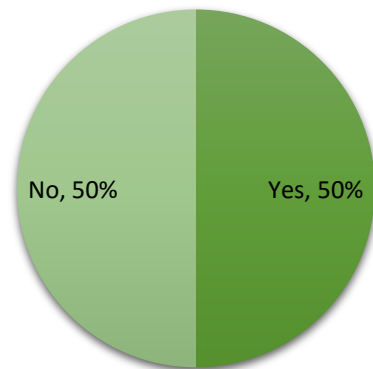
Figure 15: Existence of formal succession plan



Only 24% (29 respondents) of respondents reported that they have a formal succession plan in place. Of those that completed a succession plan, 62% received assistance in its preparation.

Note: 120 respondents

Figure 16: Existence of current business plan

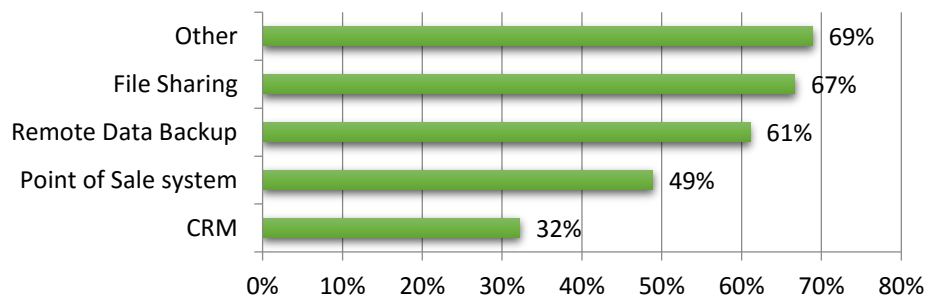


Half of all respondents (50% or 63 respondents) indicated that they have a business plan in place.

Note: 126 respondents

Respondents indicated a wide range of technology used for their business. The most frequently cited was file sharing technology (67% or 60 respondents), remote data backup (61% or 55 respondents), point of sale (49% or 44 respondents) and CRM systems (32% or 29 respondents).

Figure 17: Forms of Technology⁴⁵



Note: 90 respondents

LOCAL WORKFORCE

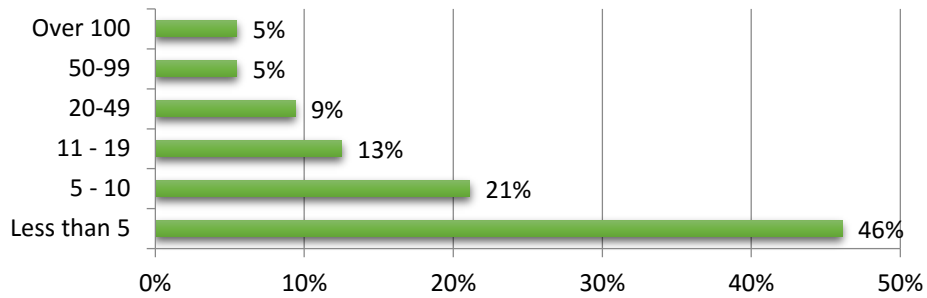
Size of Workforce

The 129 businesses interviewed reported a total of 2,498 employees. 46 % or 59 of the businesses surveyed indicated that they have less than five employees and just 5% or 7 of the businesses indicated that they have over 100 employees.

⁴ Multiple forms of technology were listed by respondents resulting in more responses than number of respondents.

⁵ This question was developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

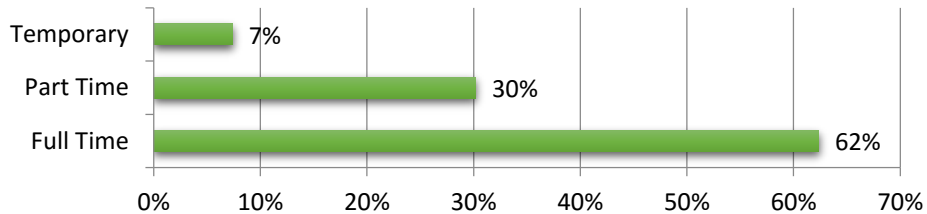
Figure 18: Total number of employees



Note: 128 respondents

62% (1,558) of employment positions at surveyed businesses are full-time, while 30% (755) are part-time and 7% (185) are temporary.

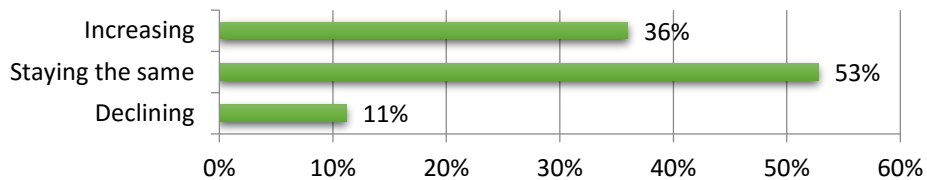
Figure 19: Nature of employment



Note: 128 respondents

53% of respondents (66 businesses) indicated that the number of employees at their business has stayed the same historically. While 36% (45 businesses) indicated that the size of their workforce has increased. Only 11% (14 businesses) indicated a decrease.

Figure 20: Historical Employment trend⁶



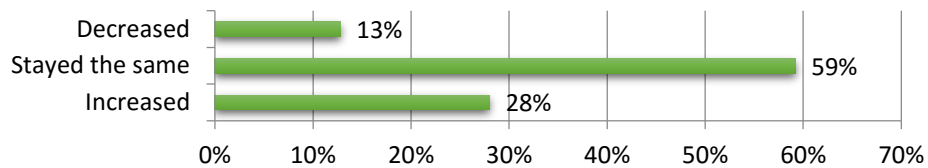
Note: 125 respondents

The last three years has seen increased and stable growth in the size of the full-time workforce, with 59% of businesses (74 respondents) reporting that the number of employees has stayed the

⁶ The question considered a 10 year historical trend.

same, and 28% (35 respondents) reporting that full-time employment over that three year time period has increased.

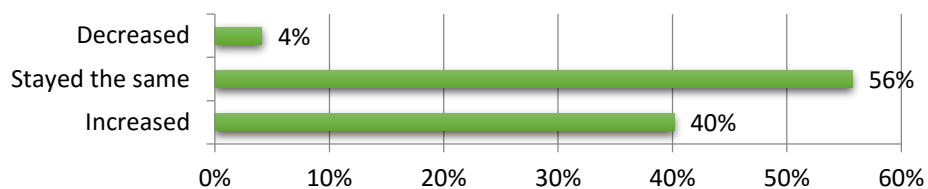
Figure 21: Full-time employment trend over last 3 years



Note: 125 respondents

56% of businesses (68 respondents) interviewed expect the size of their full-time workforce will stay the same over the next 3 years, while 40% (49 respondents) expect it to increase. 4% or 5 businesses indicated they expect a decrease over the next 3 years.

Figure 22: Full time employment trend over next 3 years



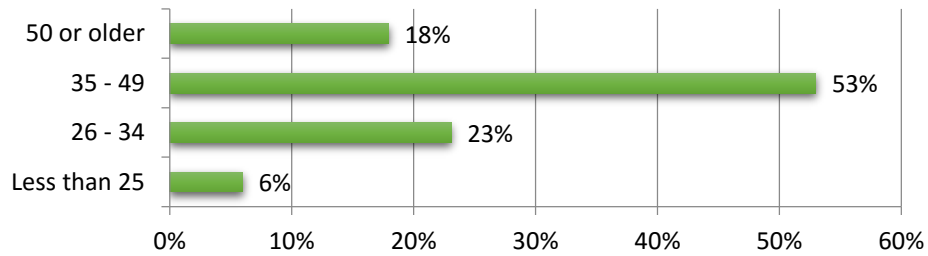
Note: 122 respondents

Workforce Demographics

53% (62 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 73% (65 respondents) of businesses indicated that less than 25% of their workforce is under the age of 25⁷, and just 3% (3 businesses) have a workforce where 75 – 100% is under the age of 25. In addition, 71% (63 respondents) indicated that between 75 – 100% their workforce is under the age of 55⁸.

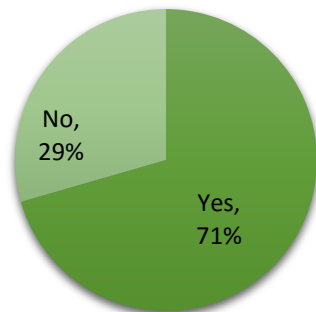
⁷ ⁸ These questions were developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

Figure 23: Age of the majority of essential employees



Note: 117 respondents

Figure 24: Hiring in previous 12 months



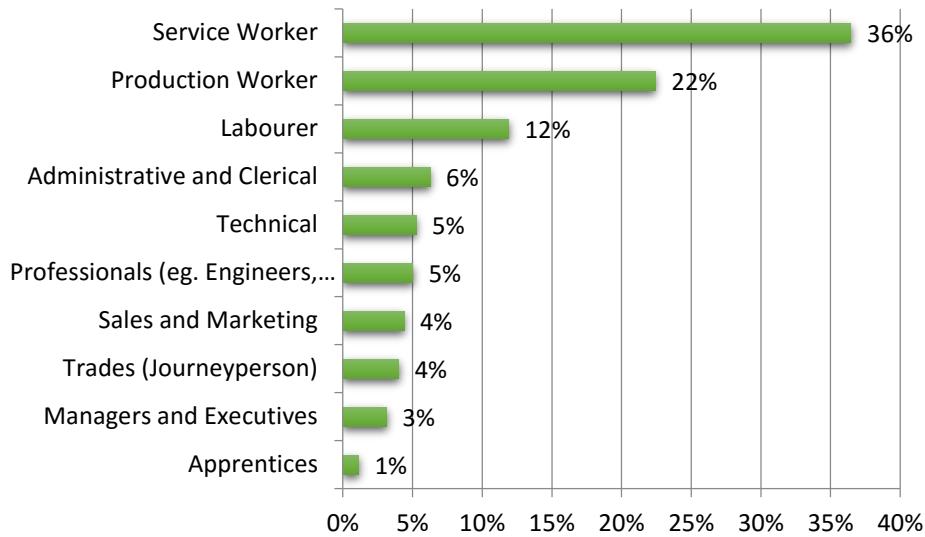
71% (67 businesses) of respondents indicated that they had hired or attempted to hire additional staff in the previous 12 months. 798 staff were hired in the previous 12 months⁹, and of those new hires, 168 (21%) were previously laid-off employees who were re-hired¹⁰.

Note: 73 respondents

The most commonly hired employee category in the previous 12 months¹¹ was service workers (36% or 291 hires), production workers (22% or 179 hires), and labourers (12% or 95 hires). The most frequently cited occupation types hired in the previous 12 months, were Clerk (19% or 131 hires), Housekeepers (9% or 63 hires), and Drivers (8% or 55 hires)¹².

⁹ ¹⁰ ¹¹ ¹² These questions were developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

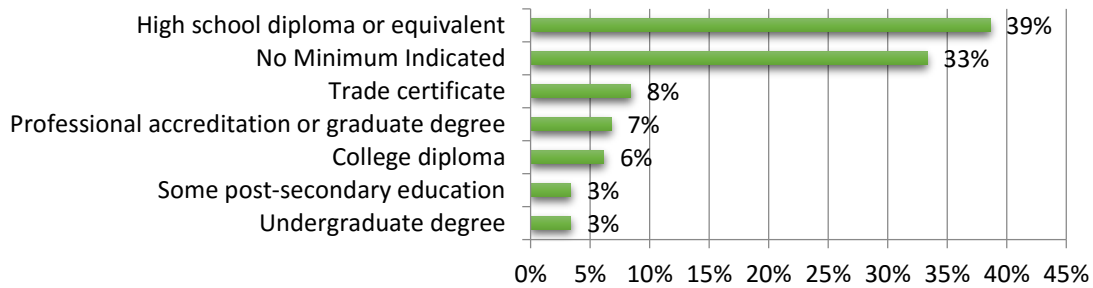
Figure 25: Employee category for new hires in previous 12 months



Note: # of respondents varies

39% of new hires (308 hires) had a high school diploma or equivalent, 33% (266 hires) of hires did not indicate the education level, and 8% (67 hires) had a trade certificate.¹³

Figure 26: Education Level for new hires in previous 12 months



Note: # of respondents varies

A detailed table outlining the number of hires by employee type and the associated education level can be found in the appendix.

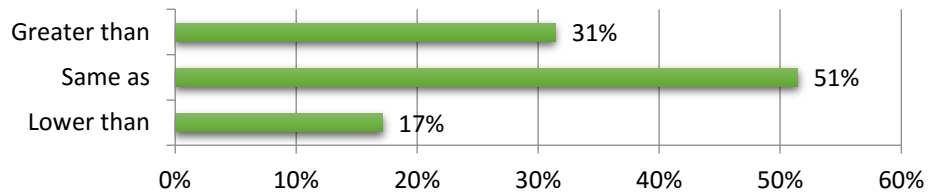
Wages

When reporting on average wages for skilled or professional workers, the majority of responses indicated they pay between \$30 and \$49 per hour (24% or 22 businesses) and between \$20 and

¹³ This question was developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

\$29 per hour (24% or 22 businesses). The most commonly reported average hourly wage for semi-skilled workers (25% or 17 businesses) was between \$20 and \$29 and the most commonly reported average wage for entry-level workers (32% or 18 businesses of respondents) was under \$10. 51% of respondents (54 respondents) reported that their wage scale is similar to other businesses in the region.¹⁴

Figure 27: Wages in relation to other businesses in the region

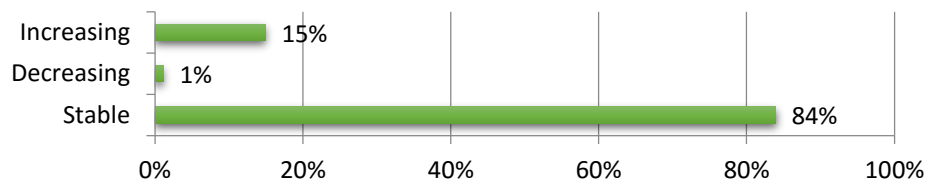


Note: 105 respondents

Recruitment and Retention

Of those businesses that responded, 84% (73 respondents) indicated that the number of unfilled positions at their company would remain constant.

Figure 28: Trend in unfilled positions



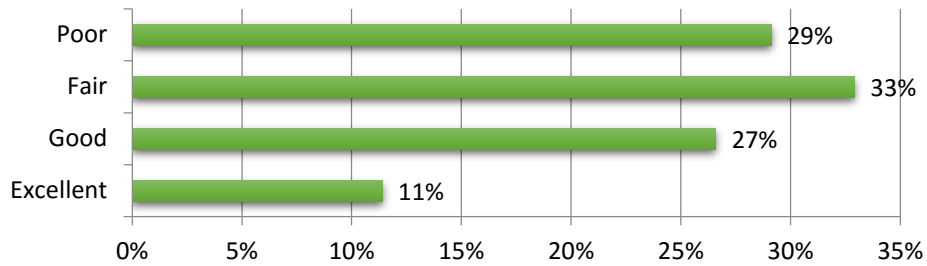
Note: 87 respondents

Just 11% (9 respondents) rated the availability of qualified workers as Excellent. The most common response was Fair, with 33% (26 respondents), however 29% (23 respondents) felt the availability was Poor, and 27% (21 respondents) rated the availability as Good.¹⁵

¹⁴ Detailed wage data is found in Appendix A.

¹⁵ This question was developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

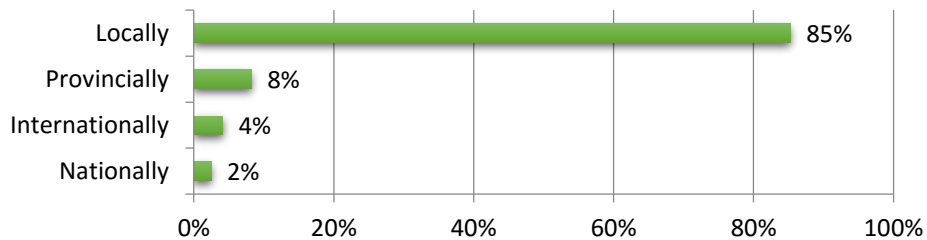
Figure 29: Availability of qualified workers



Note: 79 respondents

The vast majority of respondents (85% or 104 respondents) reported that they primarily recruit employees from local labour markets. 8% (10 respondents) recruit provincially, while 4% (5 respondents) report that they recruit internationally, and just 2% (3 respondents) recruit at the national level.

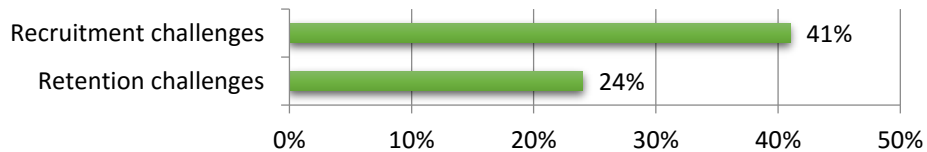
Figure 30: Location of workforce recruitment



Note: 122 respondents

Of the 119 respondents, 41% (49 respondents) indicated that they have experienced recruitment challenges and 24% (28 respondents) indicated that they have experienced retention challenges.

Figure 31: Recruitment and retention challenges



Note: # of respondents varies

When asked what efforts their business has undertaken to retain employees, 90 businesses responded. The most frequent response was regarding action taken, was 'none' (32% or 29 respondents). Competitive wages (24% or 22 respondents) and benefits (12% or 11 respondents) were frequently cited strategies employed. Other factors frequently cited by businesses include

supporting a positive environment (11% or 10 respondents), training (8% or 7 respondents), and flexible work schedule (8% or 7 respondent).

Figure 32: Key words and responses in respondents' discussion of retention efforts



“Being flexible on ‘powder days’

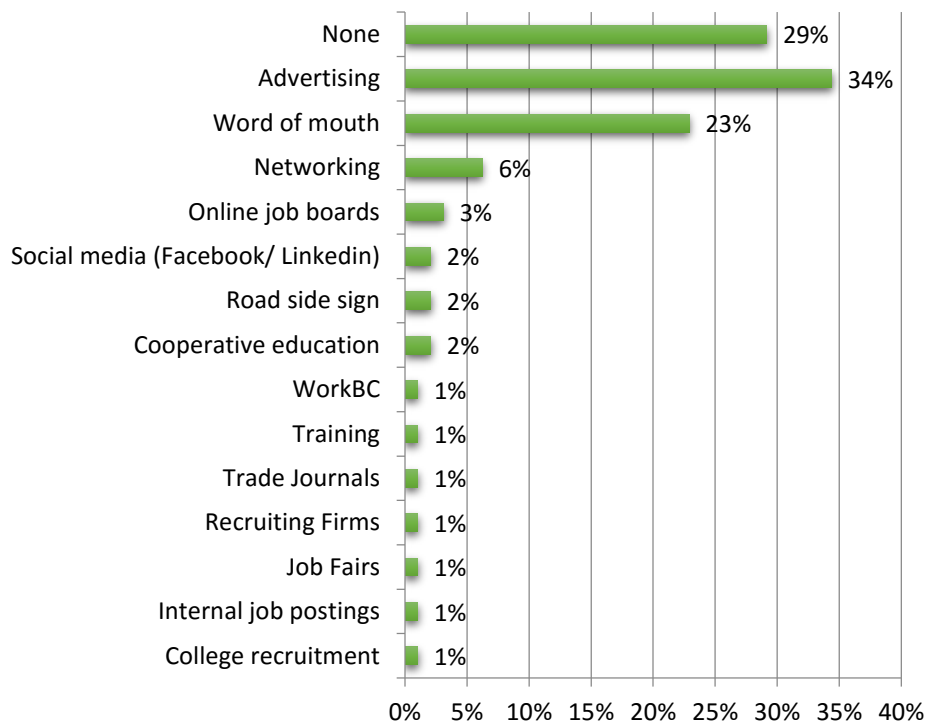
“Pay rate above industry standard and employee benefits to retain employees.”

“Paying well so they can afford to live here.”

“We do have the capacity to allow our employees to work remotely and we are just now implementing this technology. We anticipate that it will allow our employees to be more flexible and productive on their own timing, so it works for them.”

When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often were advertisements (34% or 33 respondents), no activities (29% or 28 respondents), and word of mouth (23% or 22 respondents). Respondents also cited using a wide variety of other means, including networking, online job boards and social media.

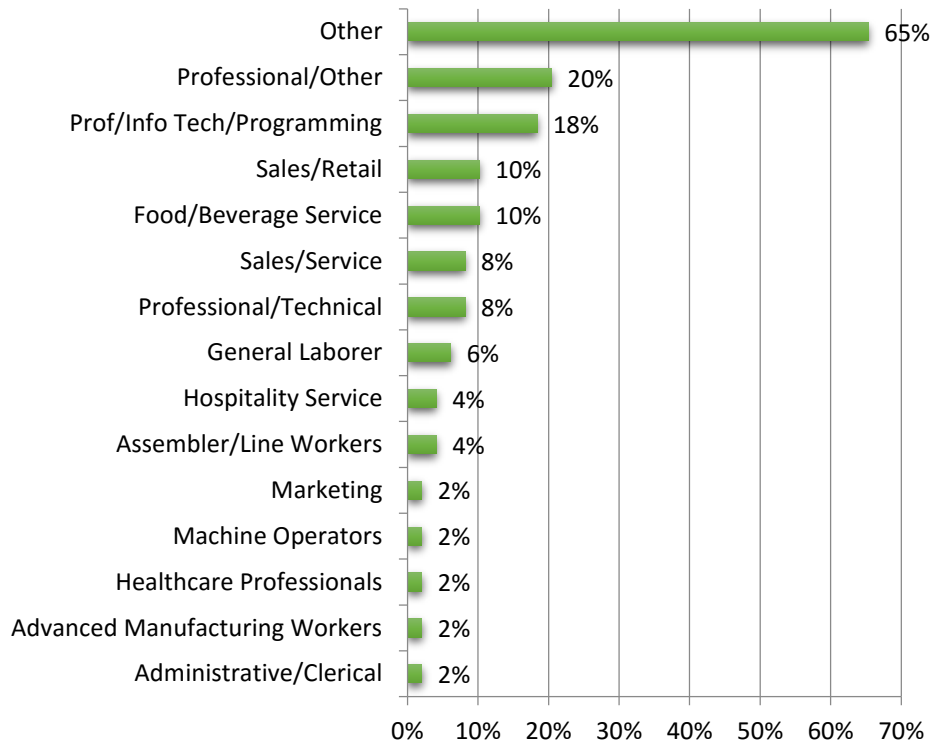
Figure 33: Recruitment Activities



Note: 96 respondents

Of the 49 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include professional/other (20% or 10 respondents), professional/information technology/programming (18% or 9 respondents), sales/retail and food/beverage service were both cited by 10% or 5 respondents as current areas of recruitment. The responses included in the 'other' and 'professional other' categories charted below are detailed in Appendix A.

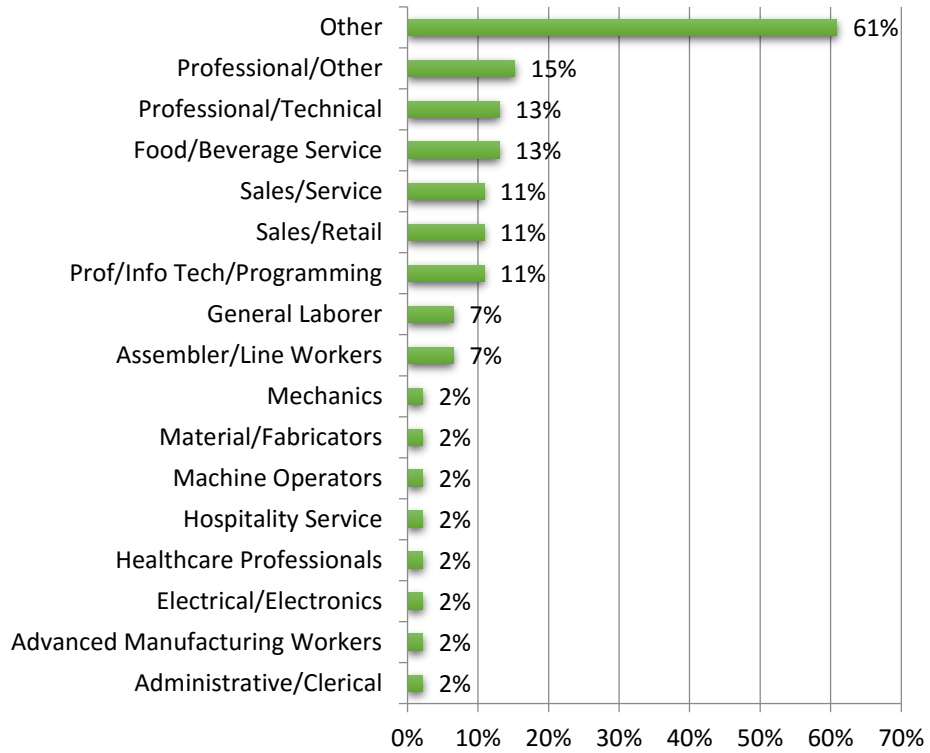
Figure 34: Current recruitment areas



Note: 49 respondents

38% of respondents (46 businesses) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include professional/other (15% or 7 respondents), and professional/technical and food/beverage service (13% or 6 respondents respectively).

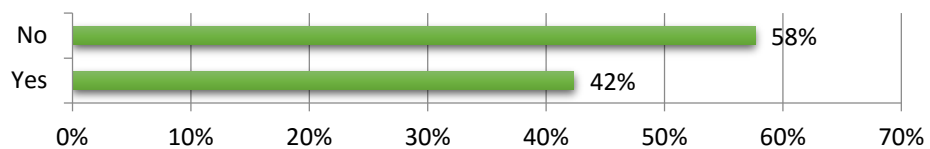
Figure 35: Future areas where recruitment may be challenging



Note: 46 respondents

42% of respondents (36 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. 22% (8 respondents) believed that providing training and education would be effective, while 11% (4 respondents) suggested supporting affordable housing and another 11% (4 respondents) suggested subsidizing wages.

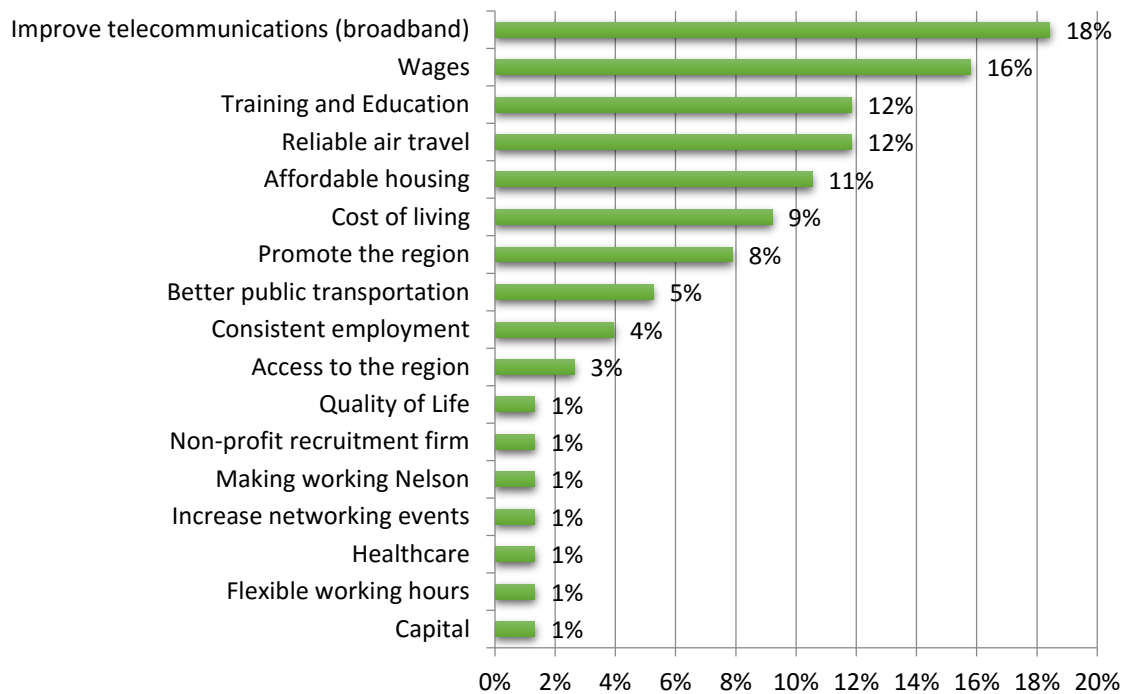
Figure 36: Strategies to overcome employee recruitment challenges



Note: 85 respondents

When asked specifically what could be done to attract and retain knowledge workers, the most frequently cited response was to improve telecommunications (broadband) service (18% or 14 respondents) and 16% cited wages (12 respondents).¹⁶

Figure 37: Recruitment and Retention of Knowledge Workers

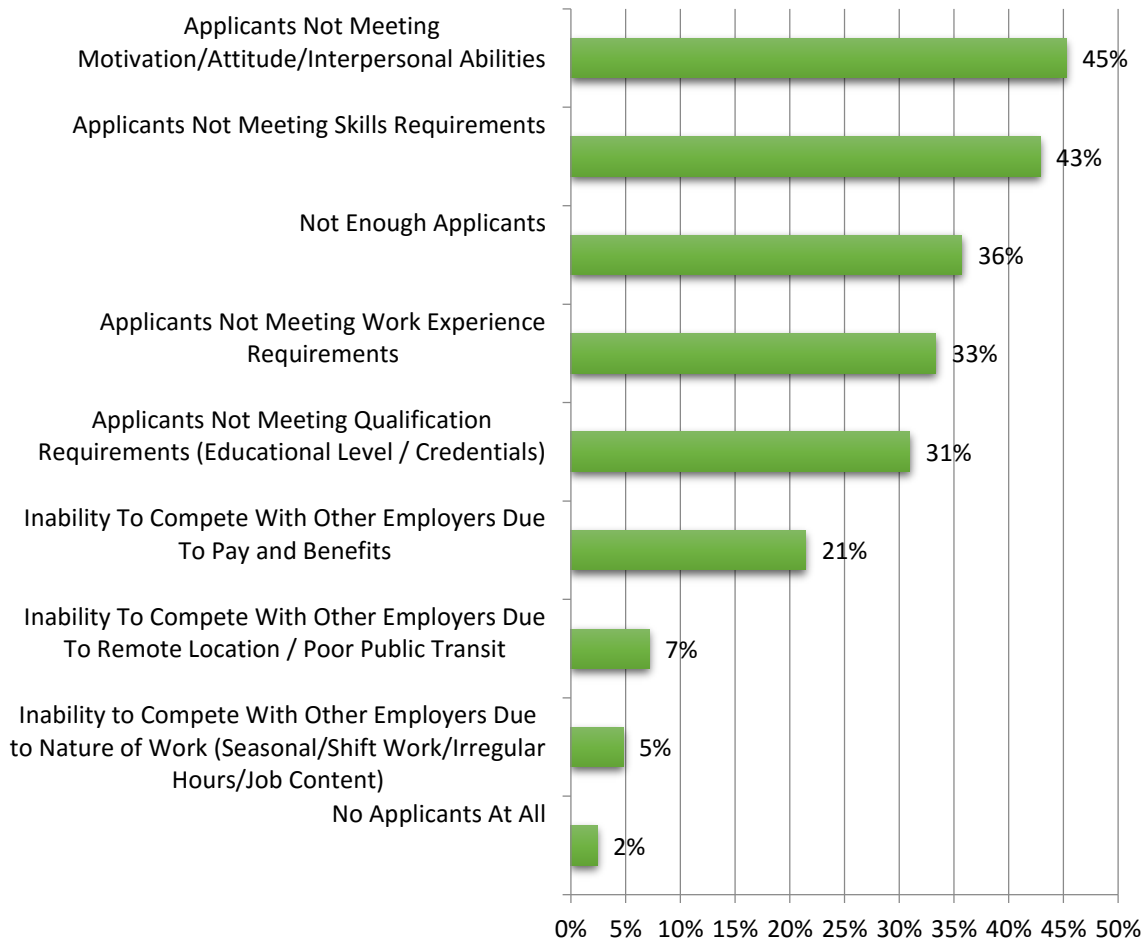


Note: 76 respondents

65% of respondents indicated that the positions they hired were hard-to-fill. Reasons given for why the positions were hard to fill include applicants not meeting motivation/attitude/interpersonal abilities (45% or 19 respondents), applicants not meeting skill requirements (43% or 18 respondents), and not enough applicants (36% or 15 respondents).¹⁷

¹⁶ ¹⁷ These questions were developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

Figure 38: New Hires

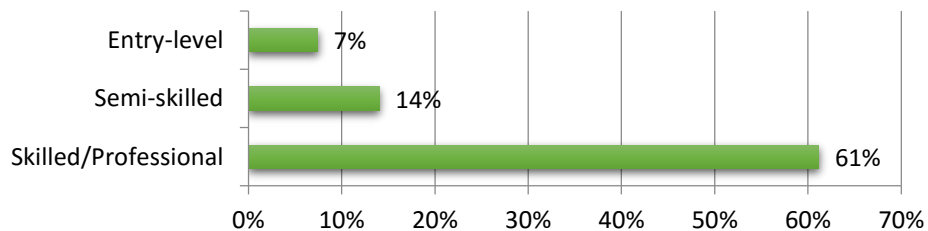


Note: 42 respondents

Skills and Training

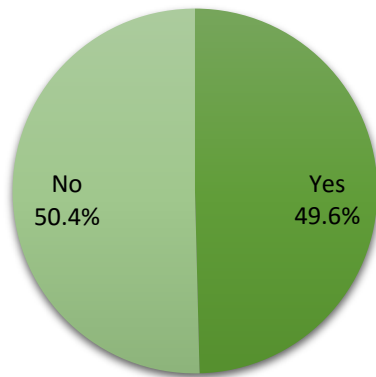
The majority of respondents (61%) indicated that over half of their workforce is comprised of skilled or professional workers, 14% indicated that their workforce is mainly semi-skilled workers and 7% indicated that entry-level workers make up the majority of their workforce.

Figure 39: Skill level of majority of workforce



Note: 121 respondents

Figure 40: Training Budget

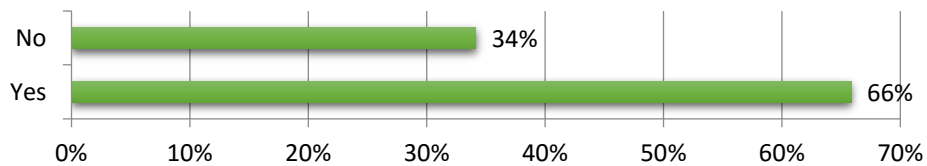


49.6% (62 businesses) indicated that there is a training budget to upgrade employee skills. 91% (87 businesses) indicated that their company offers in-house training and 40% (39 businesses) use contracted training.

Note: 125 respondents

66% of respondents (81 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.

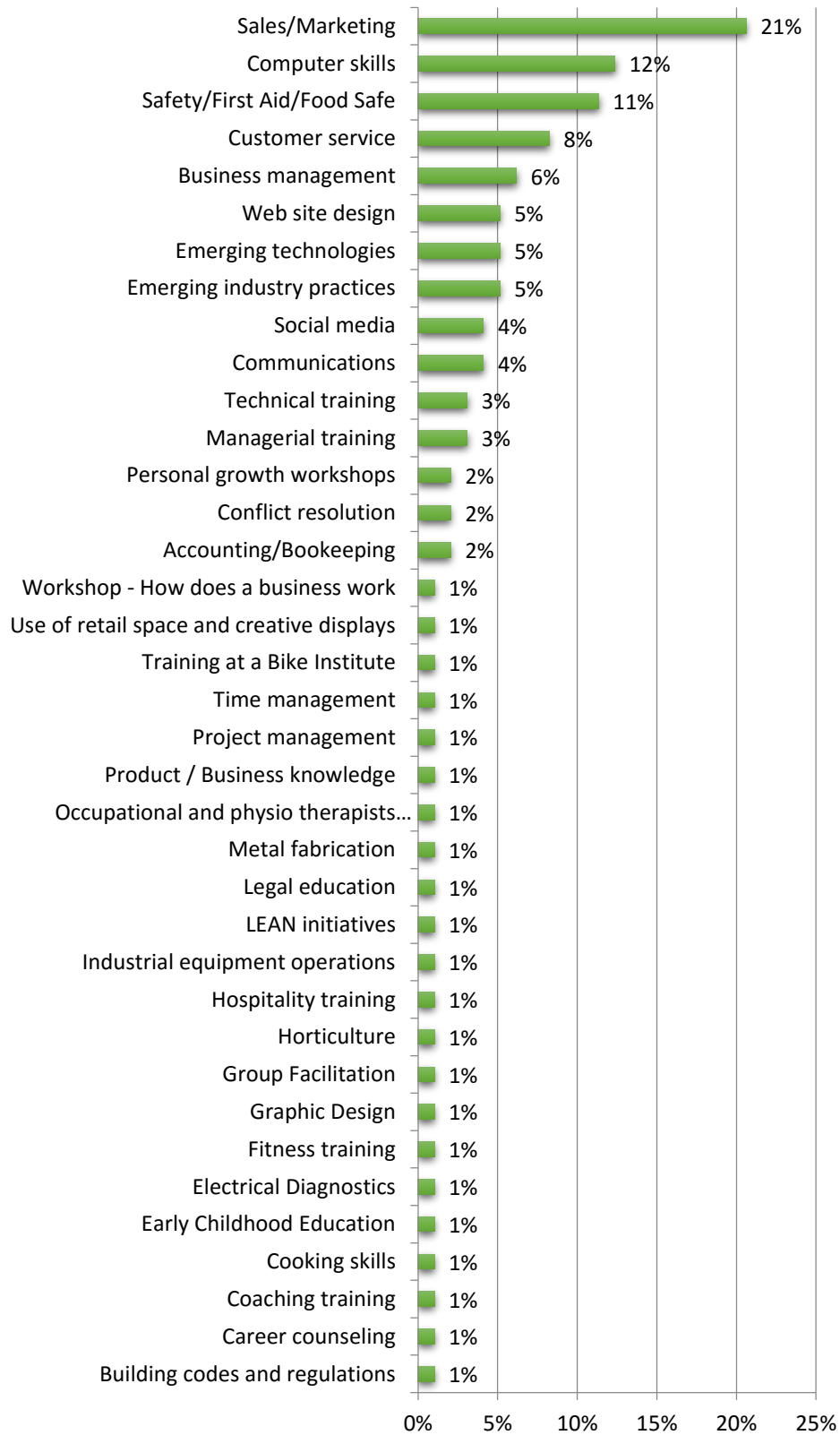
Figure 41: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 123 respondents

80% or 97 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were sales/marketing (21% or 20 businesses), computer skills (12% or 12 businesses), and safety/first aid/food safe (11% or 11 businesses).

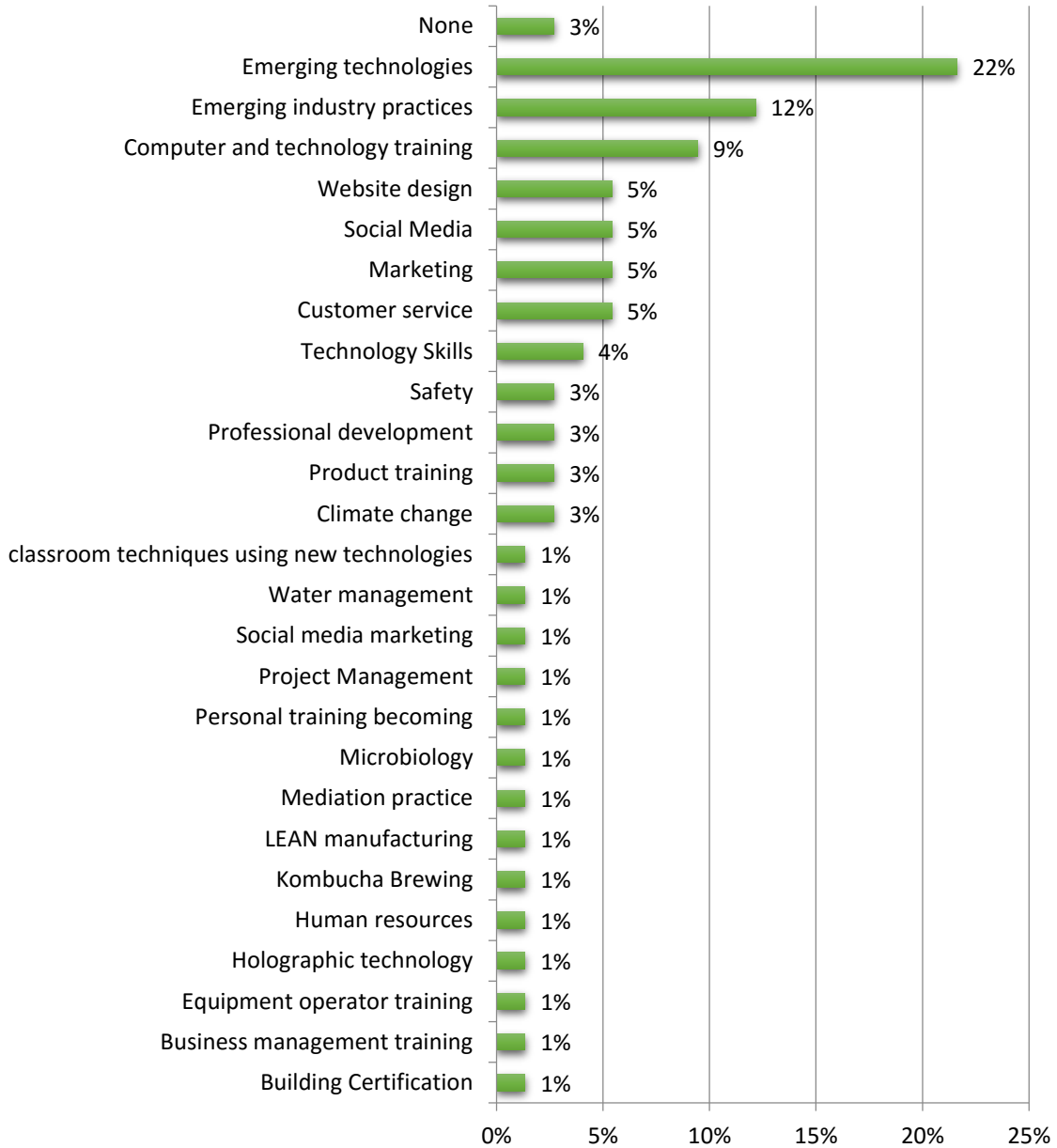
Figure 42: Training or professional development needs



Note: 97 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 emerging technologies (22% or 16 businesses). Other areas where training will be needed include emerging industry practices (12% or 9 businesses) and computer and technology training (9% or 7 businesses).

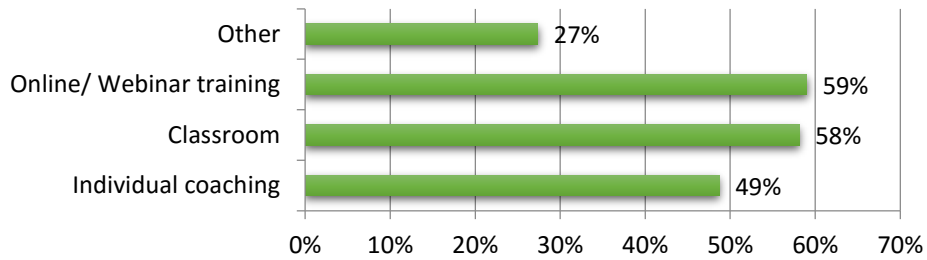
Figure 43: Areas for new Training in next five years



Note: 74 respondents

59% of respondents (69 businesses) stated that they prefer training when it is delivered through an online/webinar format, while 58% (68 businesses) preferred a classroom format, 49% or 57 businesses expressed a preference for individual coaching.

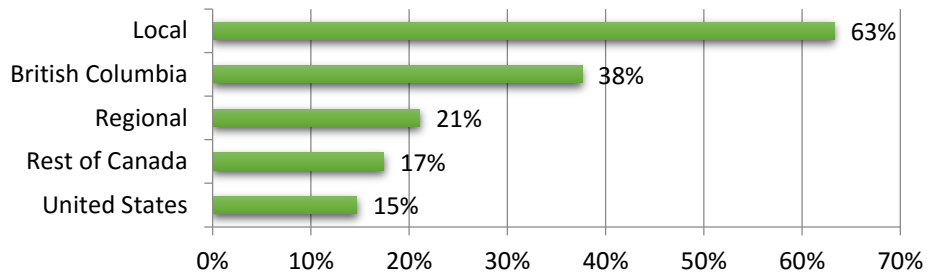
Figure 44: Preferred modes of training



Note: 117 respondents

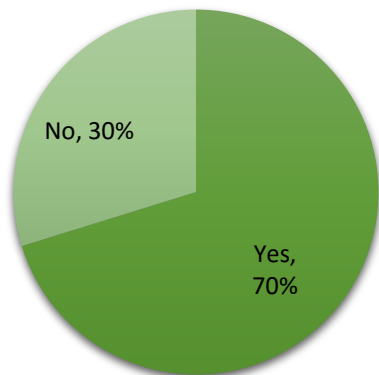
63% of respondents (69 businesses) typically seek training opportunities that are offered locally, and 38% (41 businesses) travel to other areas in the province for their training. Fewer training opportunities are sought elsewhere in the region, country or in the United States.

Figure 45: Usual training locations



Note: 109 respondents

Figure 46: Training for technology



70% of respondents (66 businesses) were interested in training to support adopting technology to grow their business. Training offered as one-on-one support was of most interest (74% or 42 respondents), followed by workshops (67% or 38 respondents) and ‘other’ (28% or 16 respondents). Topics most frequently cited include marketing (15% or 9 respondents), web development (12% or 7 respondents), social media (10% or 6 respondents) and customer relationship management (CRM) (10% or 6 respondents).

Note: 94 respondents

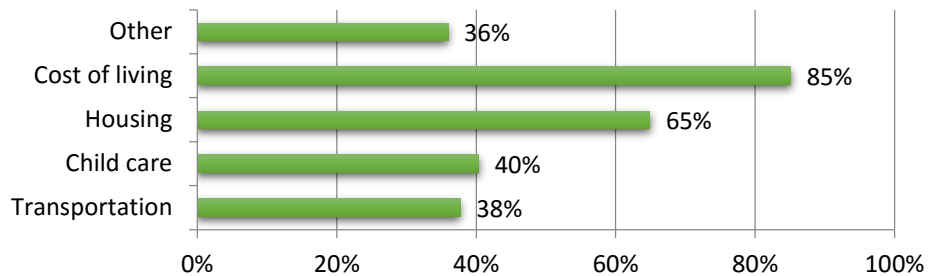
Unions

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

Employees

The most frequently cited critical issues for employees is the cost of living (85% or 97 businesses) and housing (65% or 74 businesses). Child Care (40% or 46 businesses) and Transportation (38% or 43 businesses) issues were also cited. For a list of factors included in the “other” category charted below, see Appendix A.

Figure 47: Critical considerations for employees



Note: 114 respondents

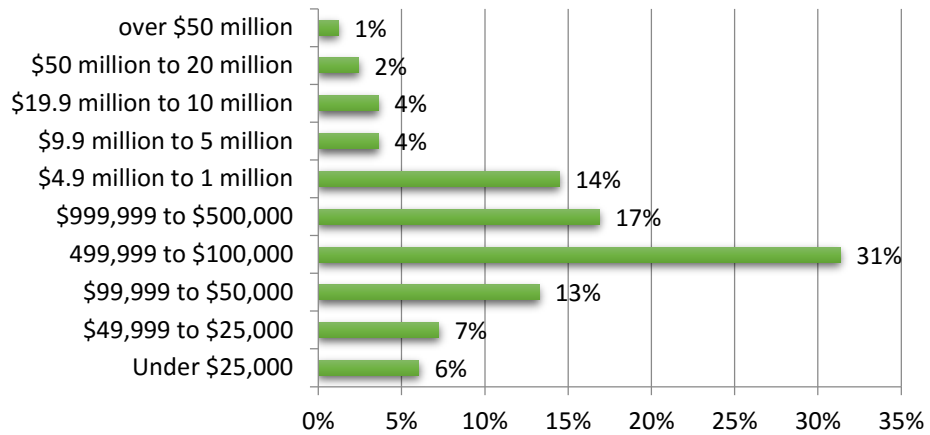
82% of businesses (98 businesses) interviewed reported that over 75% of their employees live within the community, 9% (6 businesses) indicated that 75% of the employees live elsewhere in the region and 4% (2 business) indicated that their workforce lives outside of the region.

SALES

Market Size and Share

The highest number of respondents (26 businesses or 31%) reported annual sales between \$100,000 to \$499,000. The second highest number of respondents (14 businesses or 17%) reported annual sales of between \$500,000 and \$999,999. The lowest number (1 business or 1%) reported sales of over \$50 million.

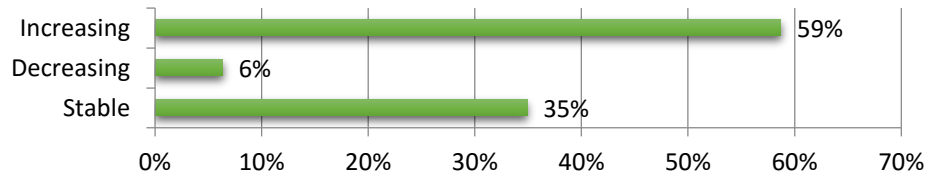
Figure 48: Annual sales



Note: 83 respondents

The majority of businesses interviewed (59% or 74 businesses) indicated that the size of the market for their product or service is increasing. Another 35% (44 businesses), reported that the market is stable.

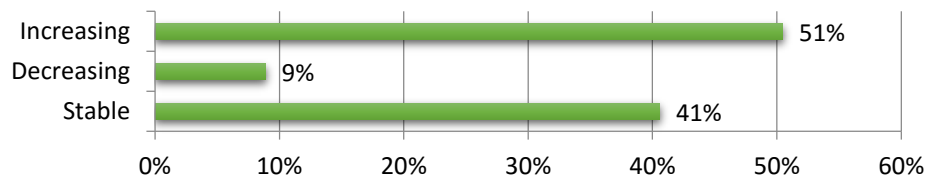
Figure 49: Status of market for product/service



Note: 126 respondents

51% (51 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 41% (41 businesses) indicated that it is stable. A small number of respondents (9% or 9 businesses) indicated that their market share is decreasing.

Figure 50: Market Share in Comparison to Competitors

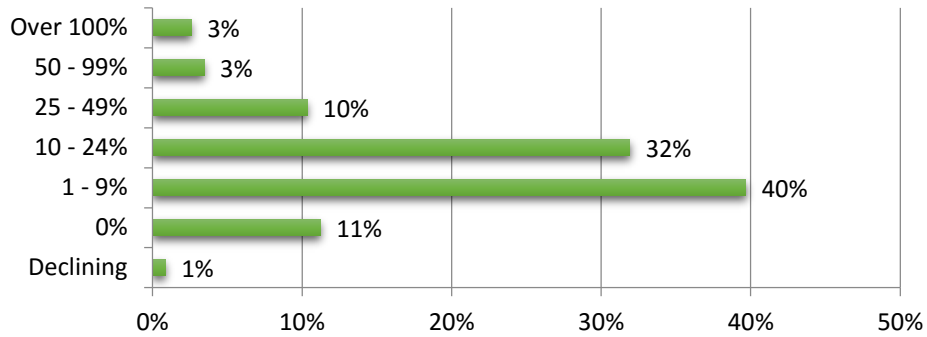


Note: 101 respondents

Growth

40% of respondents (46 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 32% of respondents (37 businesses). A combined 16% (total of 19 businesses) expect strong sales growth of over 25%. 11% (13 businesses) of respondents expect their sales to remain stagnant, while a further 1% (1 business) expects sales to decline.

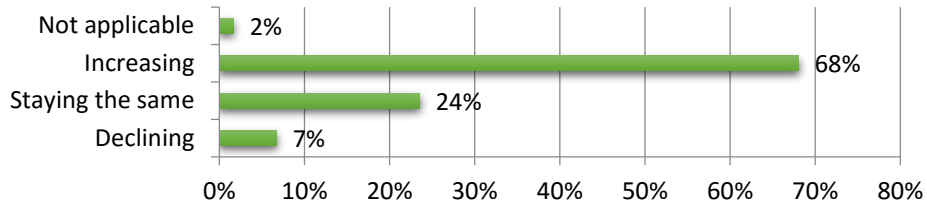
Figure 51: Projected sales growth in the next year



Note: 116 respondents

The majority of responses (68% or 81 businesses) indicated that sales at their business have increased over time, 24% (28 businesses) indicated that sales have remained relatively stable and 7% (8 businesses) reported that sales have declined.

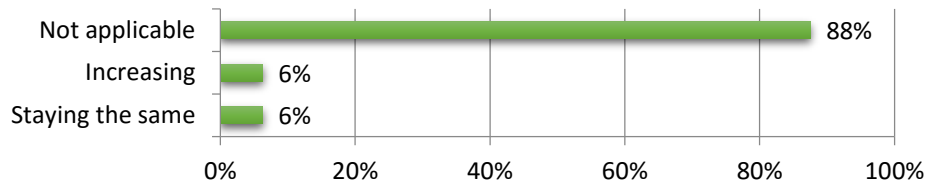
Figure 52: Historic sales trend at this location



Note: 119 respondents

Data indicates that the sales trend at parent companies is substantially different from sales trends at this location. Just 6% or 7 businesses reported that sales at their parent company have historically increased and 6% (7 businesses) reported that they have stayed the same, none reported a decline. It is worth noting that 88% of surveyed participants found the question not applicable.

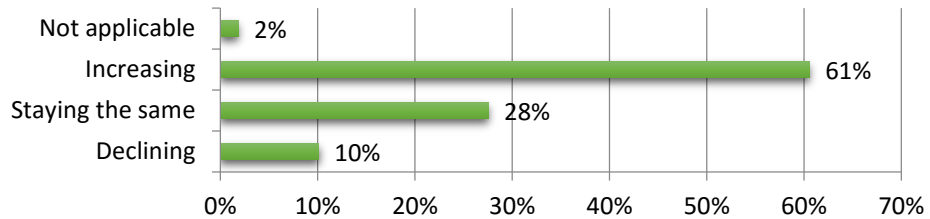
Figure 53: Historic sales trend at parent company



Note: 112 respondents

Data indicates that the sales trend within respondents' respective industries has followed the sales trend reported at the location rather than the parent company. 61% percent of respondents (66 businesses) reported that sales within their industry have been increasing while 10% (11 businesses) reported that they have been decreasing.

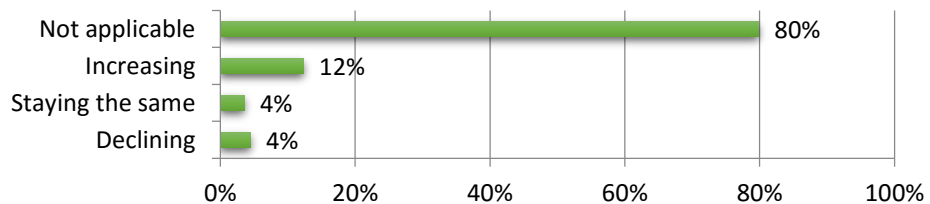
Figure 54: Historic sales trend within the industry



Note: 109 respondents

Of the 23 businesses that reported exporting to international markets, 12% (14 businesses) indicated that their export sales have been increasing, 4% (4 businesses) indicated that they have been stable, and 4% (5 businesses) reported export sales are in decline.

Figure 55: Historical export sales trend



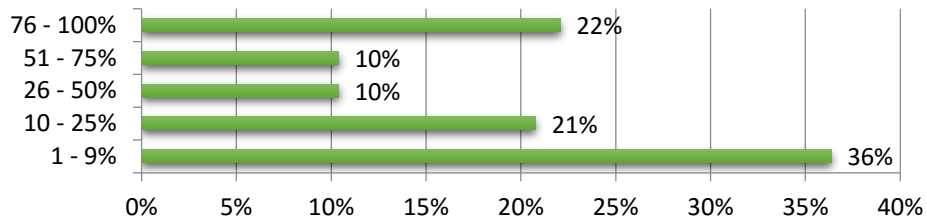
Note: 114 respondents

Source of Sales

The customer base among Nelson businesses appears to be fairly reliant on a diverse customer base, with the largest percentage of respondents (36% or 28 businesses) indicating that just 1 – 9% of their sales are generated by their top three customers. There does appear to be some reliance

on a core customer as indicated by the 22% of respondents (17 businesses) that indicated that between 76 – 100% of their sales are generated by their top three customers.

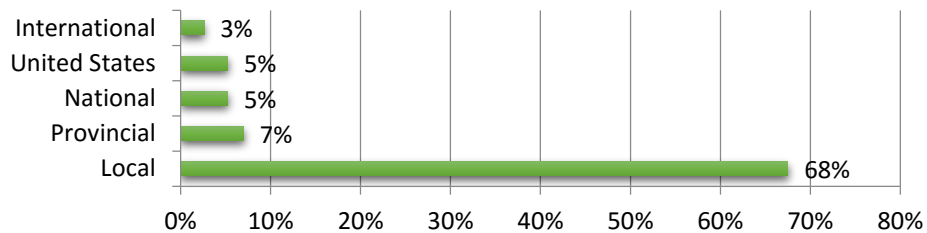
Figure 56: Sales generated by top three customers



Note: 77 respondents

A majority of respondents (68%) indicated that over 50% of their sales are to customers within the local community or region. 7% indicated that over 50% of their sales are within the province. Fewer respondents (5%, 5%, 3%) indicated that the majority of their sales are to national, US or international markets, respectively. Additionally, when asked whether they supply products or services to any company in the community, 70% (68 respondents) indicated that they did.

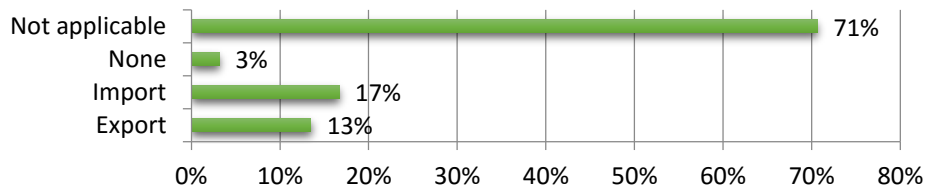
Figure 57: Geographic source of majority of sales



Note: # of respondents varies

21 respondents (17%) indicated that they import goods or services from other countries and 17 respondent (13%) indicated that they export goods or services to other countries. 71% of respondents did not find the question applied to them, or responded that they had no international trade status.

Figure 58: International trade status



Note: 126 respondents

Procurement

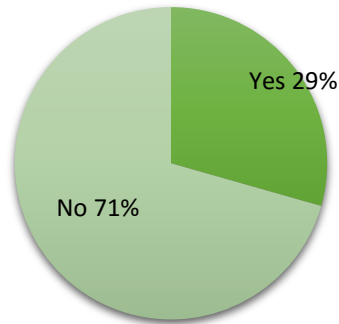


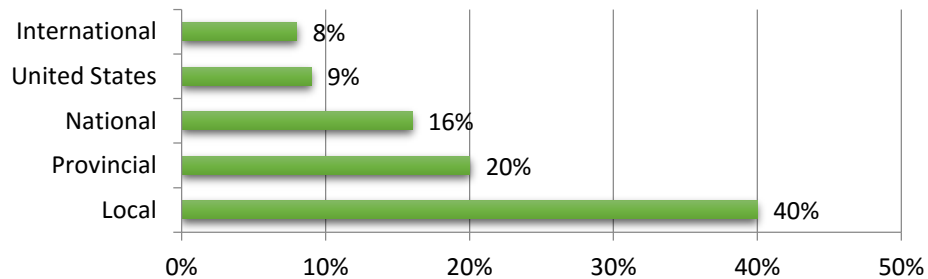
Figure 59: Engagement with government procurement processes

Only 29% (35 respondents) indicated that they engage in government procurement.

Note: 119 respondents

40% of respondents (40 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 20% (120 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 60: Geographic source of majority of supplies

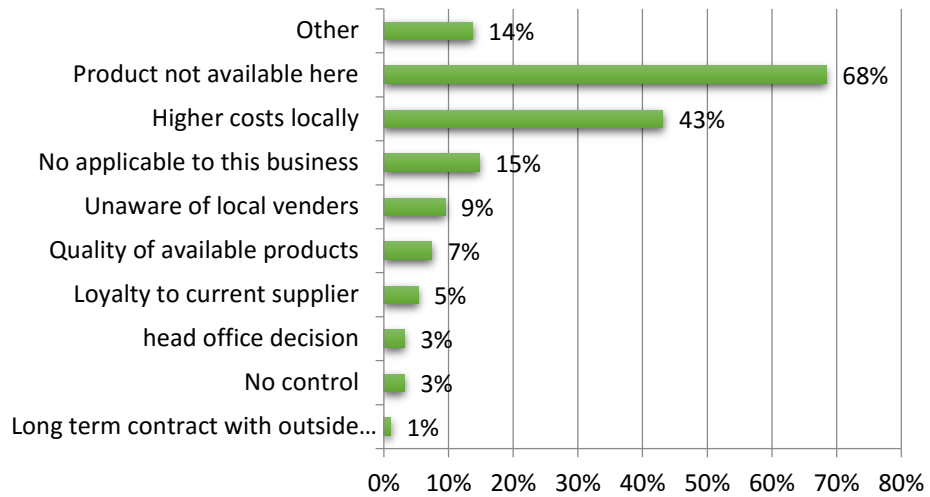


Note: # of respondents varies

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (68% or 65 businesses) indicated that the products they need are not available locally.

Figure 61: Reason for out-of-area purchasing



Note: 95 respondents

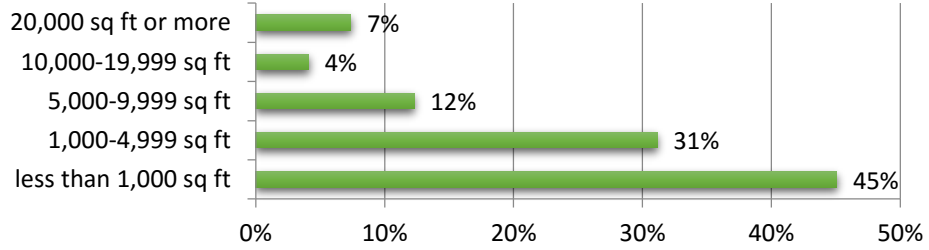
The most commonly referenced products that businesses stated they would like to source from a local supplier include computers/software, meats & dairy, fruits and vegetables, grains, office supplies and office furniture.

FACILITIES AND EQUIPMENT

Size and Condition

45% (55 businesses) of respondents reported that their facility is less than 1,000 square feet in size, and another 31% (38 businesses) indicated it was between 1,000 and 4,999 square feet.

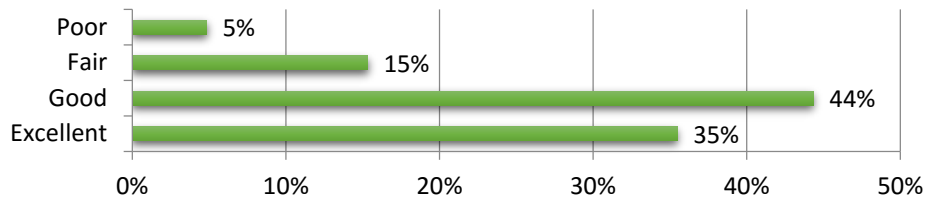
Figure 62: Size of facility



Note: 122 respondents

44% of respondents (55 businesses) indicated that their facility is in good condition. Another 35% (44 businesses) indicated that it is in excellent condition and 15% (19 businesses) reported that their facility is in fair condition. Only 5% (6 businesses) reported that their facility is in poor condition.

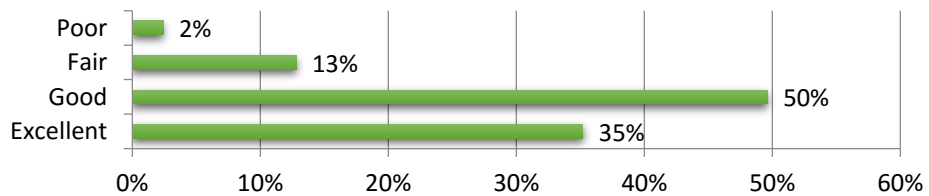
Figure 63: Condition of facility



Note: 124 respondents

35% (44 businesses) of respondents indicated that their equipment is in excellent condition. 50% (62 businesses) indicated that it is in good condition and 13% (16 businesses) report their equipment is in fair condition.

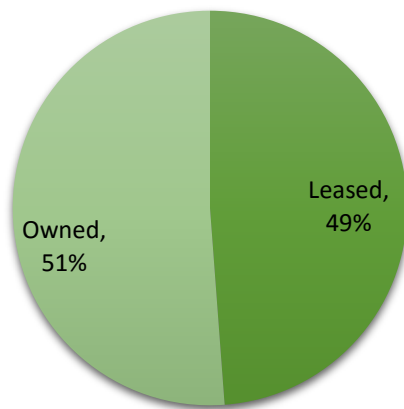
Figure 64: Condition of equipment



Note: 125 respondents

Ownership

Figure 65: Ownership status of facility

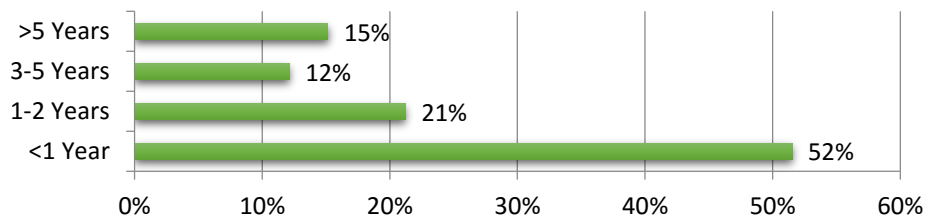


51% of respondents (65 businesses) own the facility in which they operate and 49% (62 businesses) lease it.

Note: 127 respondents

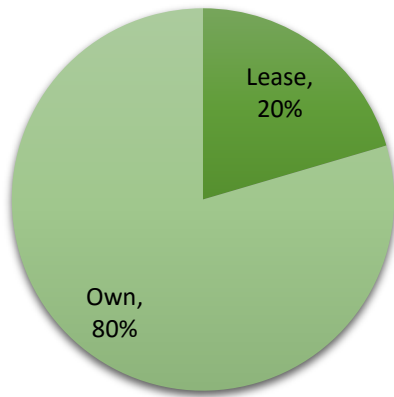
Of the 62 businesses that lease their facility, and provided a response to the question, 52% have less than a year remaining on their lease and 21% have between 1 and 2 years remaining. The majority of respondents that lease their facility (81% or 48 businesses) intend to renew their current lease agreement. Some of the reasons given for not renewing the current lease include the plan to purchase a facility (27% or 3 businesses), moving to a new location (27% or 3 businesses), the high cost (18% or 2 businesses), and business expanding (18% or 2 businesses).

Figure 66: Length of time remaining on lease



Note: 33 respondents

Figure 67: Ownership preference



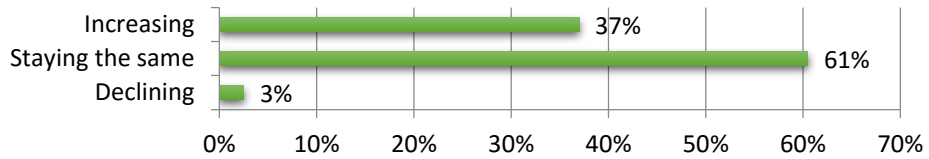
80% of respondents (70 businesses) would prefer to own their facility.

Note: 88 respondents

Investment and Expansion

61% of respondents (72 businesses) indicated that their company’s investment in their facility has stayed the same over the past 18 months, while 37% (44 businesses), indicated that the investment has increased. Only three businesses (3%) indicated that investment in their facility has decreased over the same time period.

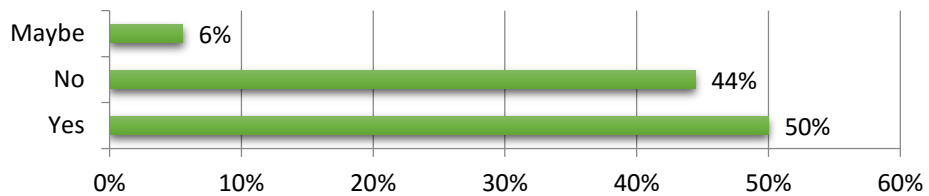
Figure 68: Historical Investment in facility (past 18 months)



Note: 119 respondents

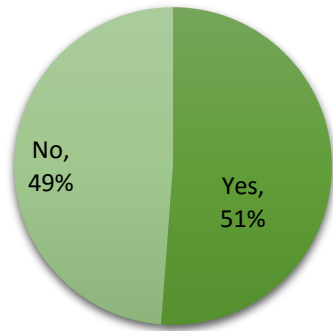
50% of respondents (63 businesses) indicated that there *was* room for expansion at their site, and 44% (56 businesses) indicated that there *was not* room at their site.

Figure 69: Room for expansion



Note: 126 respondents

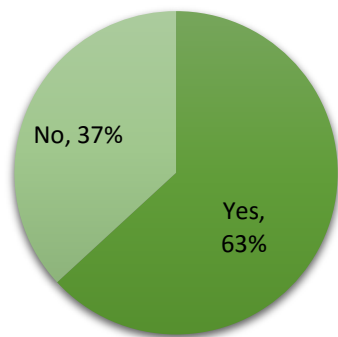
Figure 70: Plans to expand within three years



51% of respondents (64 businesses) plan to expand within three years, 49% (61 businesses) do not. Additionally, 44% (50 businesses) plan to expand in the next 12 – 18 months.

Note: 125 respondents

Figure 71: Adequacy of current site to support expansion

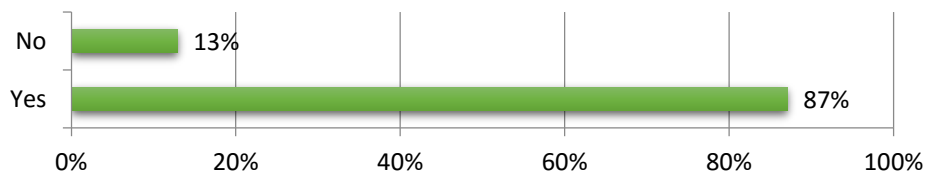


Of the 64 businesses planning expansion within the next three years, 63% (36 businesses) reported that their current site will be adequate. Notably however, 21 businesses (37%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 57 respondents

The vast majority of respondents (87% or 54 businesses) indicated that expansion will occur within the community.

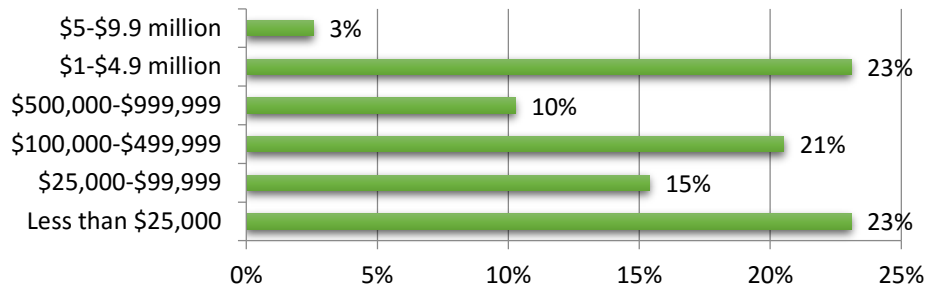
Figure 72: Expansion to occur in community



Note: 62 respondents

The total investment anticipated for the planned expansion plans ranges substantially. 23% (9 businesses) anticipate investing between \$1 and \$4.9 million, and an additional 23% (9 businesses) are planning more modest investments in the range of less than \$25,000.

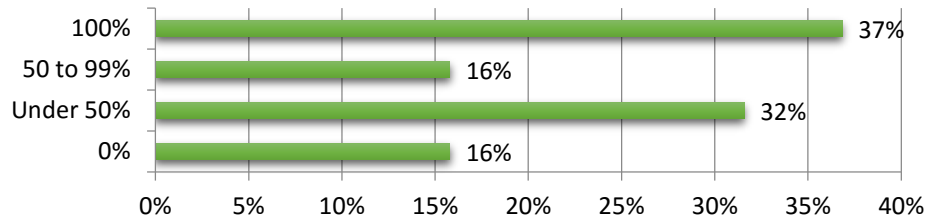
Figure 73: Estimated expansion investment



Note: 39 respondents

Of the 64 businesses planning expansion, 37% (14 businesses) responded to state that they expect to spend 100% of their expansion budget on equipment and technology, while 32% (12 businesses) responded to indicate that 50% of their expansion budget will be devoted to equipment and technology.

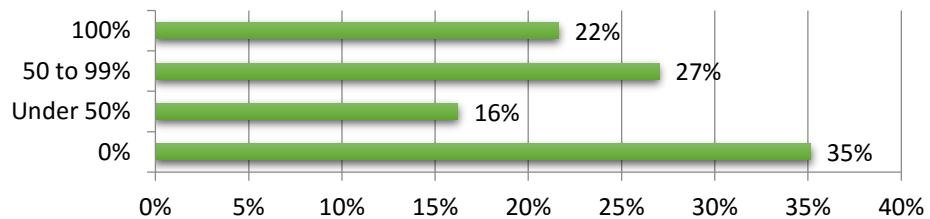
Figure 74: Component of expansion budget for equipment and technology



Note: 38 respondents

8 respondents (22% of businesses) expects to spend 100% of their expansion budget on real estate, while another 27% (10 businesses) expect to spend between 50 – 99% and 16% (6 businesses) of respondents will spend under 50% of their expansion budget on real estate.

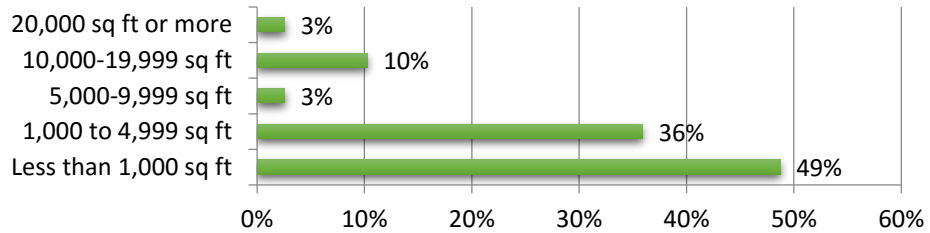
Figure 75: Component of expansion budget for real estate



Note: 37 respondents

49% (19 respondents) of businesses indicated that expansion plans will be less than 1,000 square feet. 36% (14 respondents) of businesses anticipated an expansion of between 1,000 and 4,999 square feet, while just one respondent (3%) expected an expansion of over 20,000 square feet.

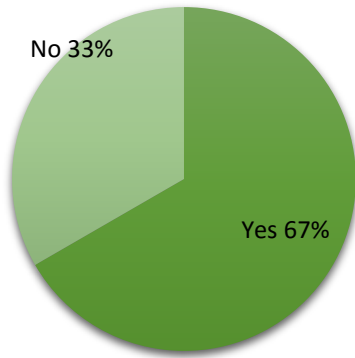
Figure 76: Size of facility expansion



Note: 39 respondents

Facility Upgrades

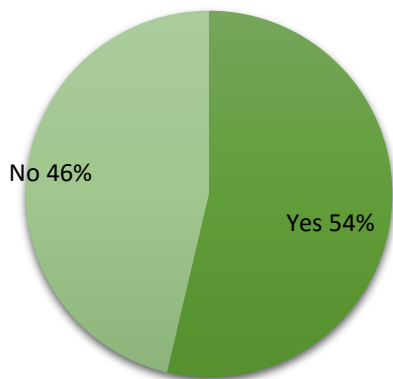
Figure 77: Recent facility upgrades



67% of businesses (66 businesses) indicated that there had been recent facility upgrades. Of those 66 businesses, 31% indicated that those upgrades were completed in the last 12 months.

Note: 99 respondents

Figure 78: Planning facility upgrades

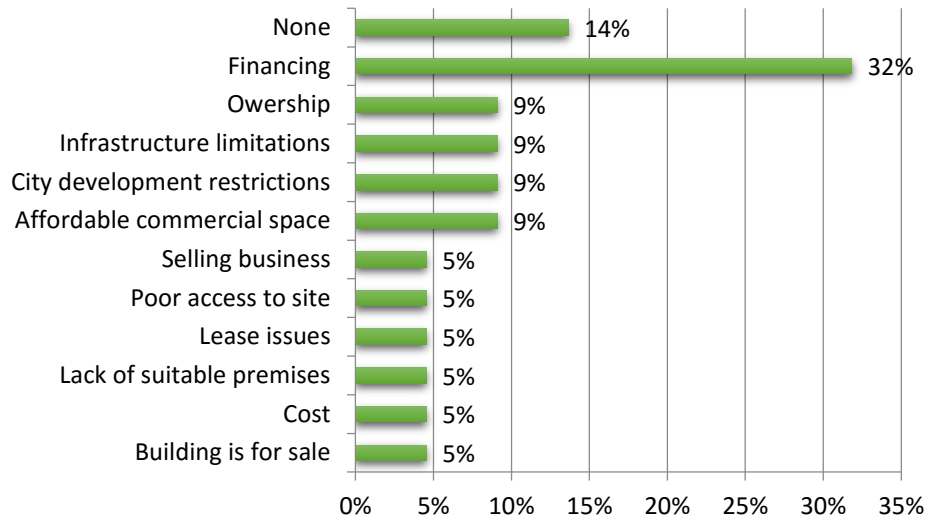


54% (51 businesses) indicated that they are planning facility upgrades, and that the majority (39% or 19 businesses) of those planning upgrades will occur in the next 3 months.

Note: 95 respondents

Respondents were also asked to identify any barriers to upgrading. The most frequently cited barrier was financial (32% or 7 businesses). Other factors cited include ownership, infrastructure limitations, city development restrictions, and affordable commercial space (9% or 2 businesses respectively).

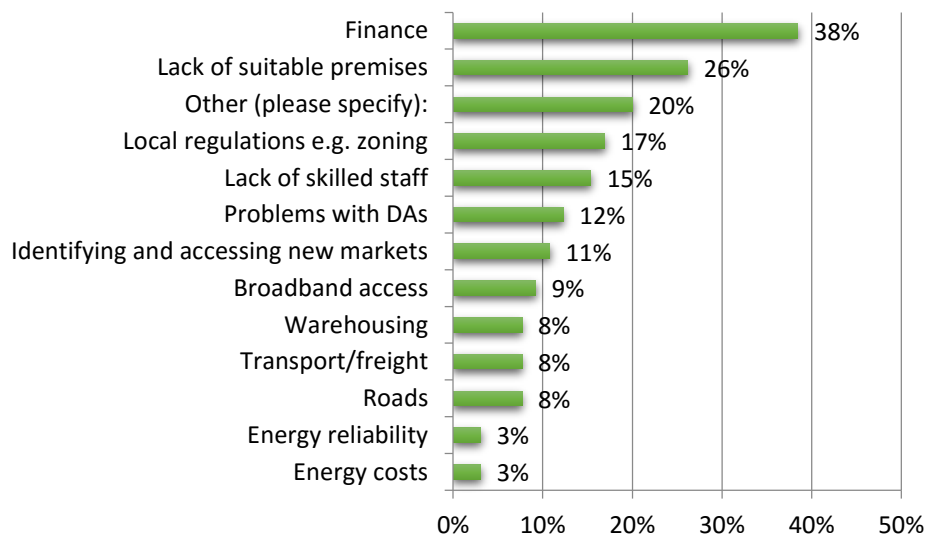
Figure 79: Barriers to upgrading



Note: 22 respondents

Respondents cited a variety of factors that act as constraints to their expansion. Most common of those were finance (38% or 25 businesses), lack of suitable premises (26% or 17 businesses), and local regulations (17% or 11 businesses). Other responses are listed in Appendix A.

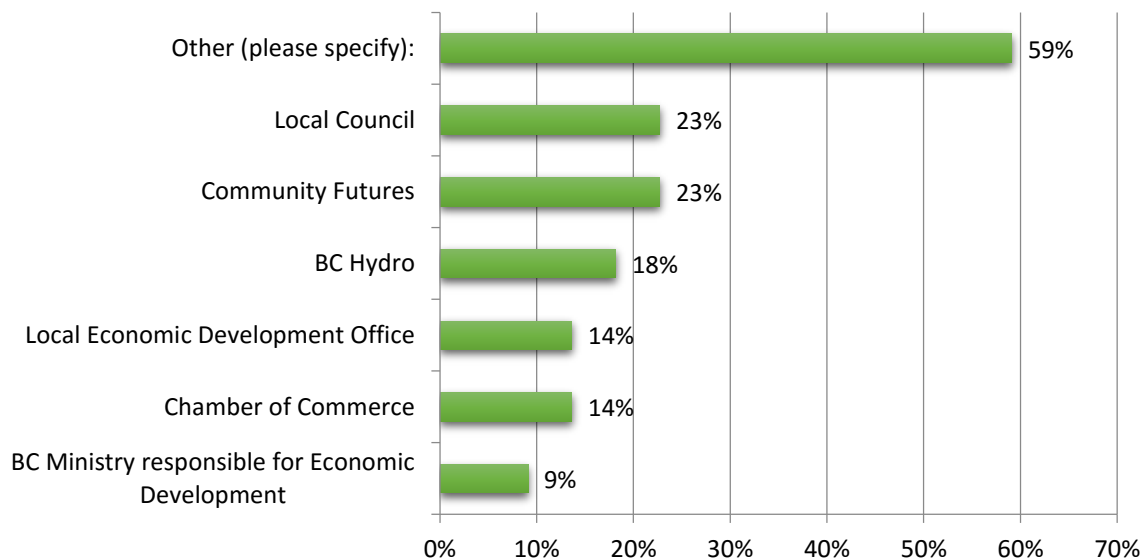
Figure 80: Barriers to expansion



Note: 65 respondents

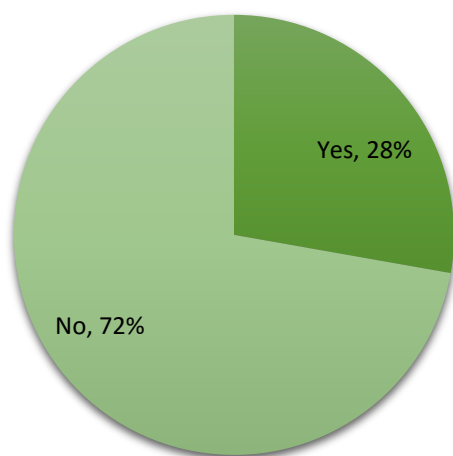
Just 25% of respondents (23 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest numbers had approached the local council (23% or 5 businesses), Community Futures (23% or 5 businesses), Nelson Hydro (18% or 4 businesses), the Local Economic Development Office (14% or 3 businesses), the local Chamber of Commerce (14% or 3 businesses), and the BC Ministry responsible for Economic Development (9% or 2 businesses).

Figure 81: Organizations approached for expansion assistance



Note: 22 respondents

Figure 82: Interest in co-working space



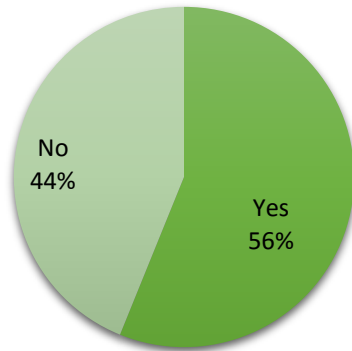
28% of respondents (25 businesses) indicated that they would be interested in operating out of a co-working space with other workers.¹⁸

Note: 90 respondents

¹⁸ This question was developed by the Nelson and Area Economic Development Partnership to identify and address labour market supply and demand, uncover some emerging labour market trends, as well as determine barriers to labour retention in Nelson and Area.

Energy Efficiency

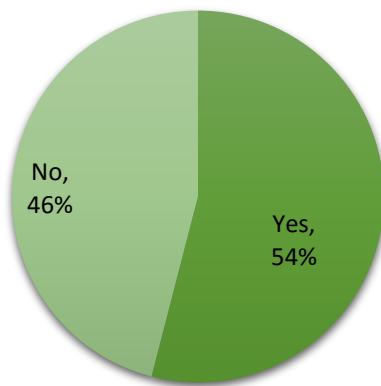
Figure 83: Considering energy efficiency in expansion plans



56% of those who responded (64 businesses) are considering energy efficiency in their expansion plans.

Note: 114 respondents

Figure 84: Awareness of BC Hydro Power Smart



54% of respondents (67 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Note: 124 respondents

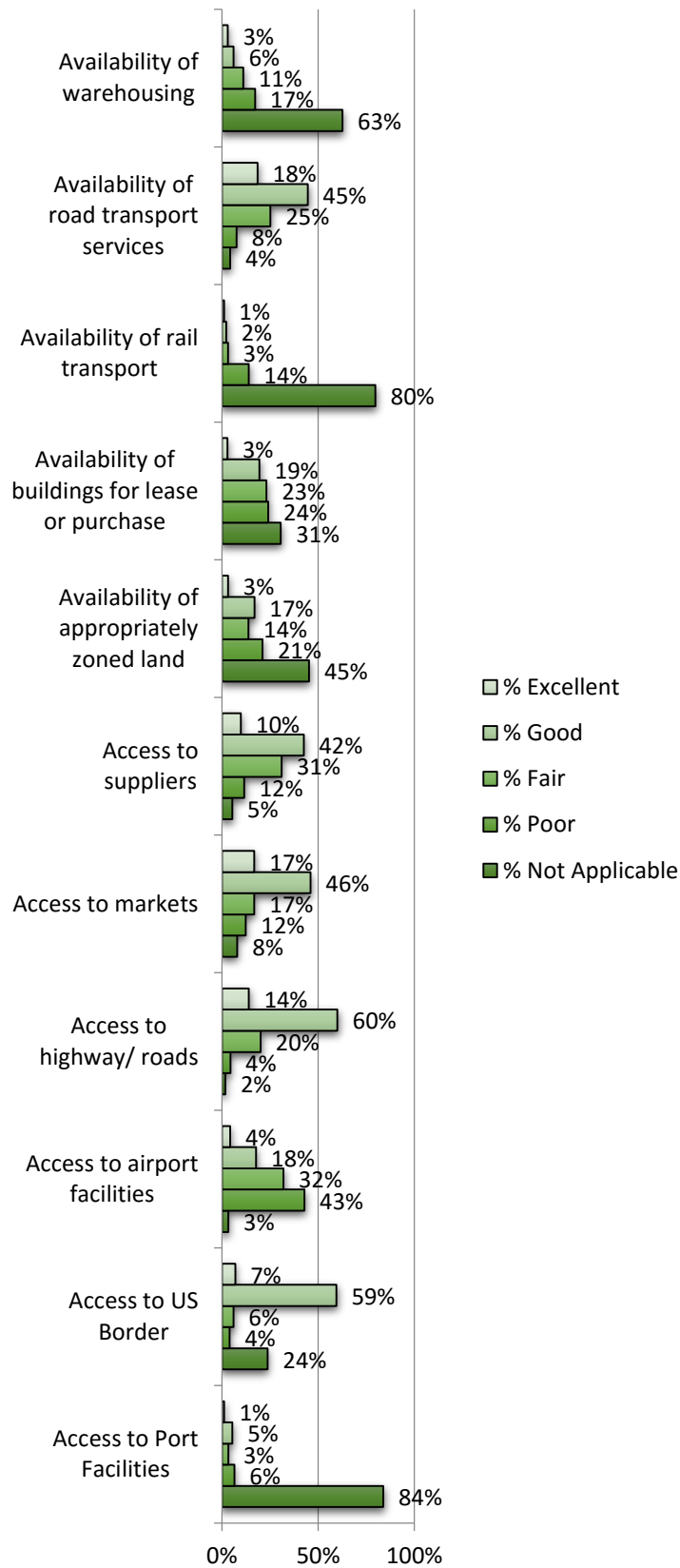
GOVERNMENT SERVICES

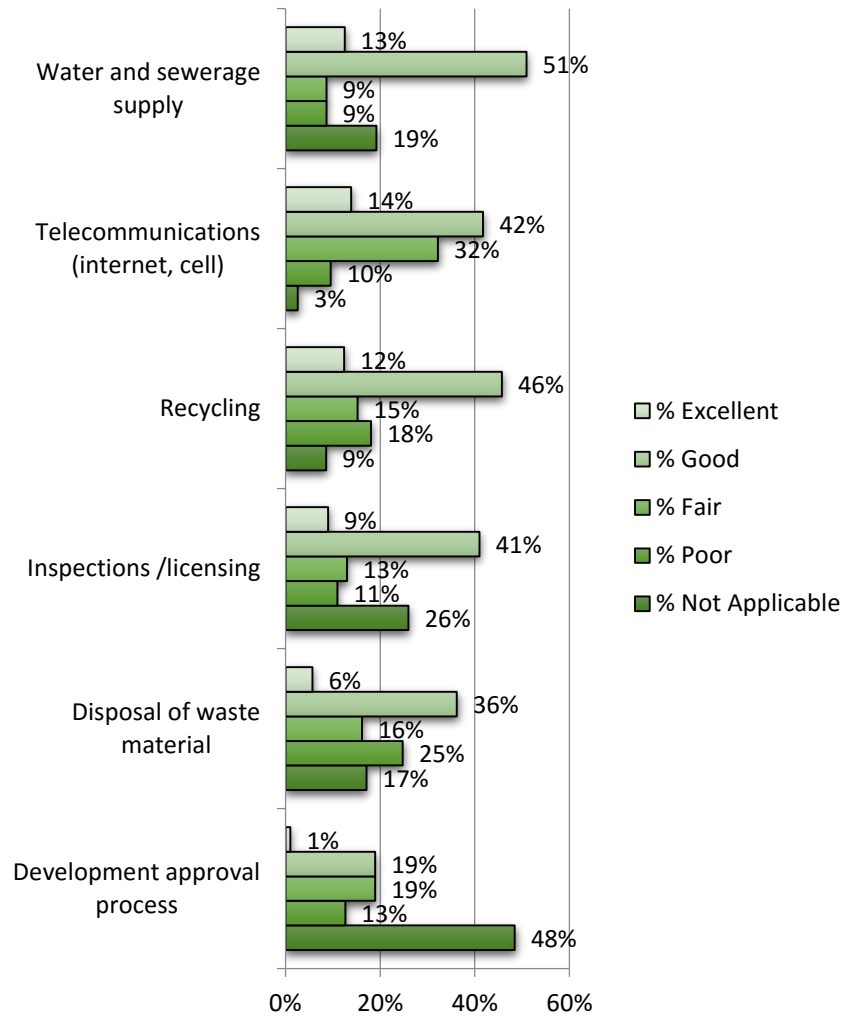
Respondents were asked to rate a list of government services as poor, fair, good or excellent. Respondents also had the option to rate a service as not applicable to their business.

- The services that received the highest number of **POOR** ratings were access to airport facilities (43% or 51 businesses), disposal of waste materials (25% or 26 businesses), and availability of buildings for lease or purchase (24% or 26 businesses).
- The services that received the highest number of **FAIR** ratings were access to airport facilities (32% or 38 businesses), telecommunications (32% or 37 businesses), and access to suppliers (31% or 35 businesses).
- The services that received the highest number of **GOOD** ratings were access to highways/roads (60% or 69 businesses), access to the US border (59% or 60 businesses) and water and sewerage supply (51% or 53 businesses).

- The services that received the highest number of **EXCELLENT** ratings were access to availability of road transport services (18% or 22 businesses), access to markets (17% or 19 businesses), telecommunications (14% or 16 businesses) and access to highway/roads (14% or 16 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (84% or 78 businesses), availability of rail transport (80% or 75 businesses) and the availability of warehousing (63% or 62 businesses).

Figure 85: Rating of government services





Note: # of respondents varies

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 73% respondents (85 businesses) indicated they had suggestions. The highest number of responses (29% or 25 businesses) discussed improvements to the airport service, along with expansion of the electronic communication service (22% or 19 businesses).

Figure 86: Key words and responses in respondents' suggestions for improvements to government services



“Landing lights at the Castlegar airport for night flights in and out - greater reliability.”

“Better cell coverage and competition on prices / services

“Improved instrumentation at the Castlegar Airport so flights are more reliable.”

Airport funding/accessibility is key for economic development.”

“Easier and faster shipping.”

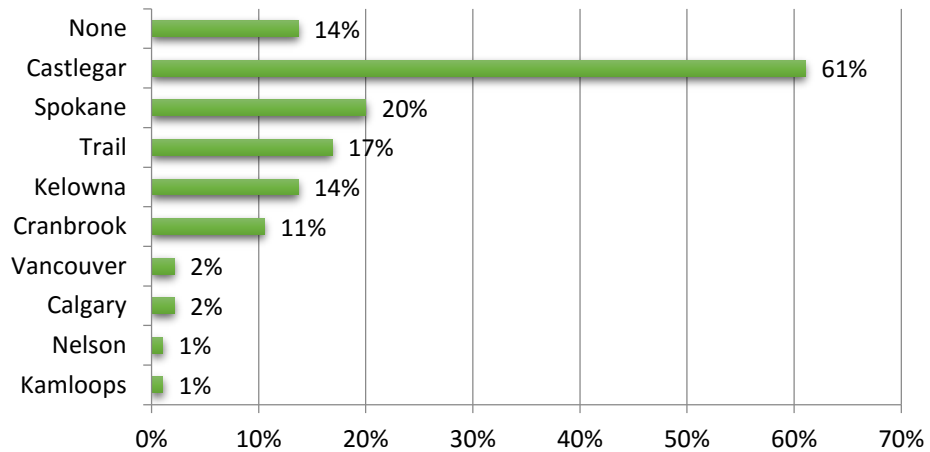
“Assist the development process instead of blocking development.”

“Recycling access; hours of operation are not conducive to business owners - a barrier”

Airport Service

The West Kootenay Regional Airport (Castlegar) is the most used airport, with 61% of respondents (58 businesses) indicating they use that airport. The Spokane International Airport was the second most used with 20% (19 businesses), and the Trail Regional Airport being used by 17% of respondents (61 businesses).

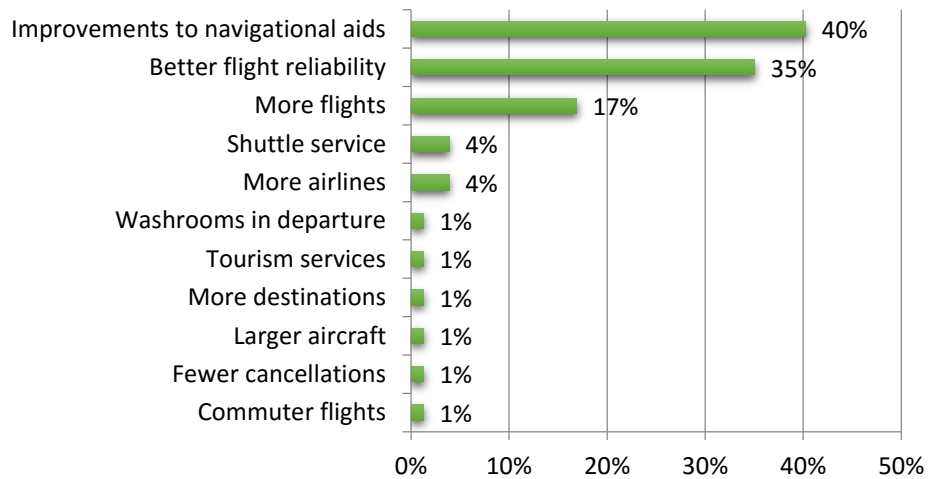
Figure 87: Airport service used



Note: 95 respondents

Respondents indicated that they would most like improvements to navigational aids (40% or 31 businesses) and better flight reliability (35% or 27 businesses).

Figure 88: New services at local airport



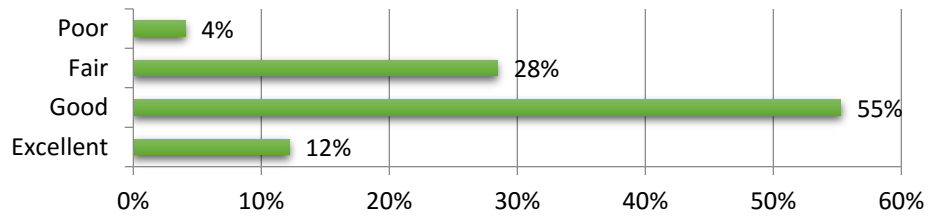
Note: 77 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as good (55% or 68 businesses).

Figure 89: Rating of local business climate

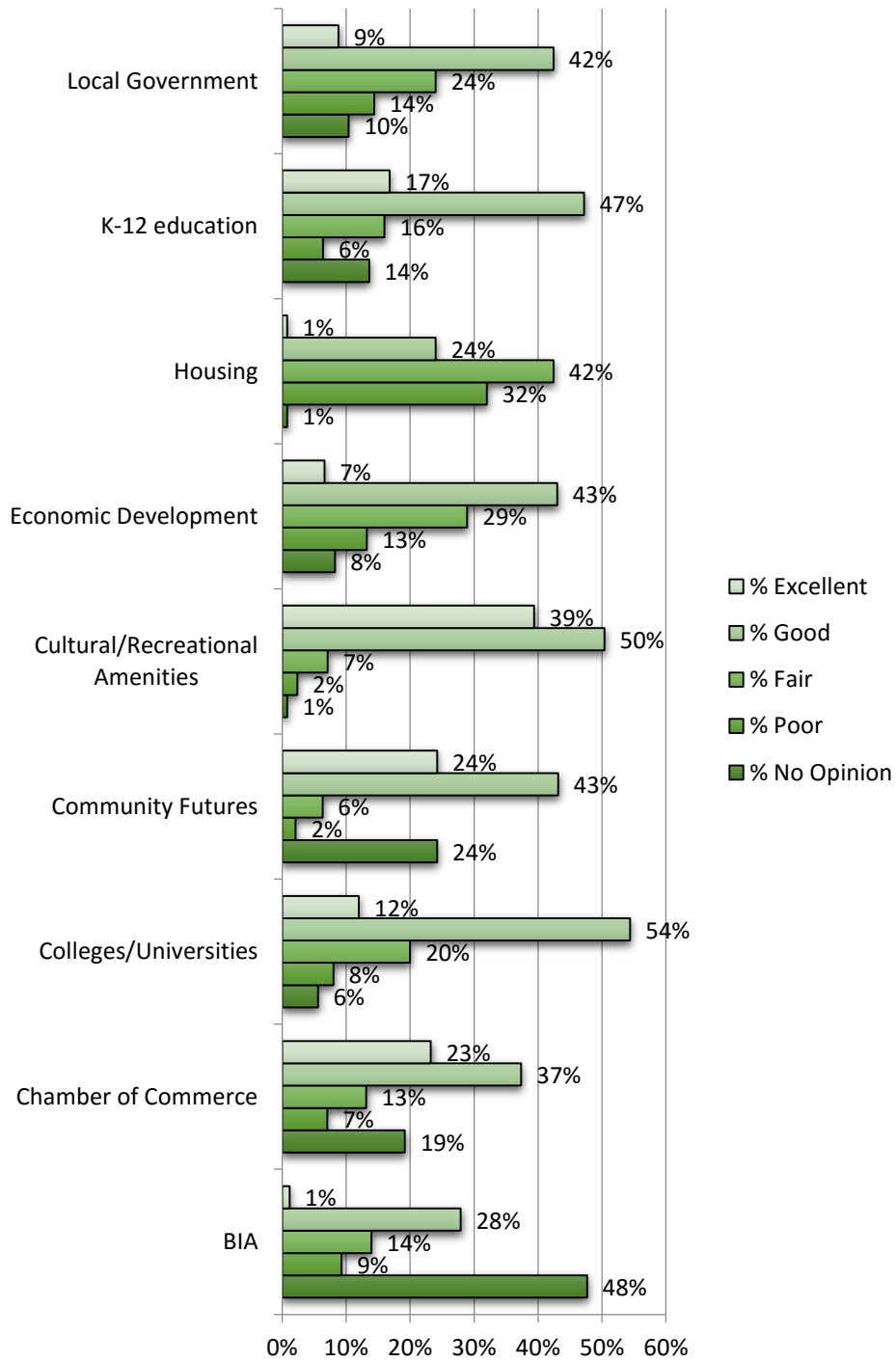


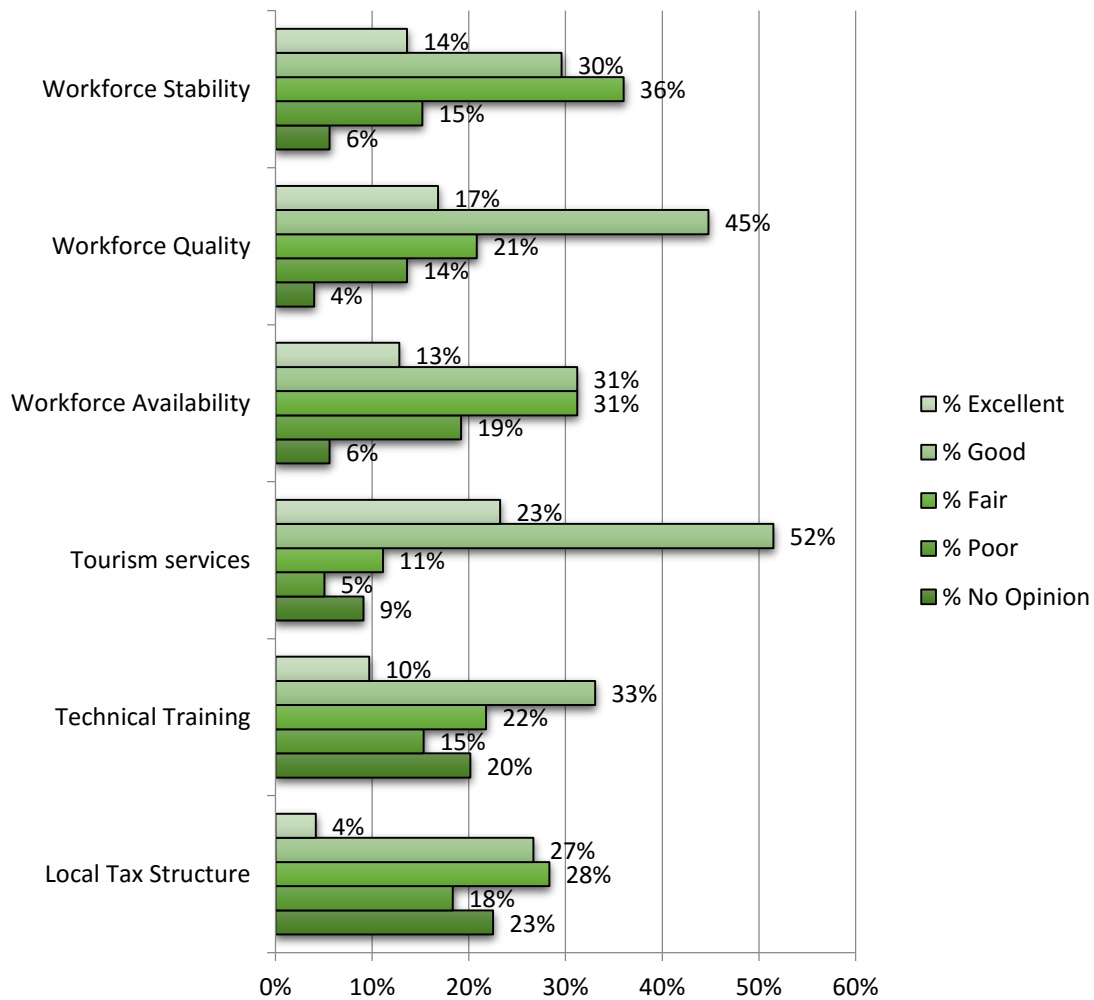
Note: 123 respondents

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

- The factors that received the highest number of **POOR** ratings included housing (32% or 40 businesses) and workforce availability (19% or 24 businesses).
- The factors that received the highest number of **FAIR** ratings included housing (42% or 53 businesses) and the workforce stability (36% or 45 businesses).
- The factors that received the highest number of **GOOD** ratings included colleges/universities (54% or 68 businesses) and tourism services (52% or 51 businesses)
- The factors that received the highest number of **EXCELLENT** ratings included cultural/recreational amenities (39% or 50 businesses) and community futures (24% or 23 businesses).
- The factors that received the highest number of **NO OPINION** ratings include the Business Improvement Association (BIA) (48% or 41 businesses), and Community Futures (23% or 27 businesses).

Figure 90: Rating of business climate factors

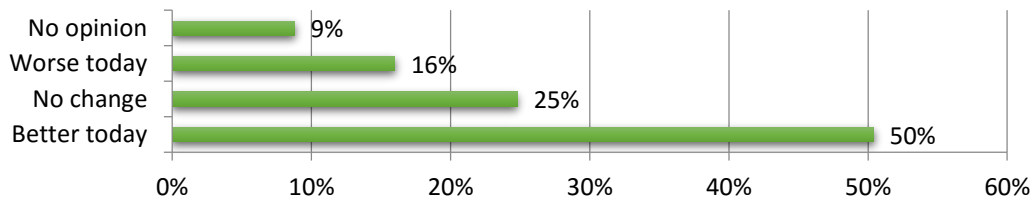




Note: # of respondents varies

50% of respondents (63 businesses) felt that the business climate is better today than it was 5 years ago. 16% (20 businesses) thought that it is worse, and 25% (31 businesses) believed there was no change in the business climate. Some of the reasons given from those who believe the business climate is worse are: declining economy (32% or 6 respondents), online shopping (16% or 3 respondents), and the legalisation of marijuana in some US states (11% or 2 respondents).

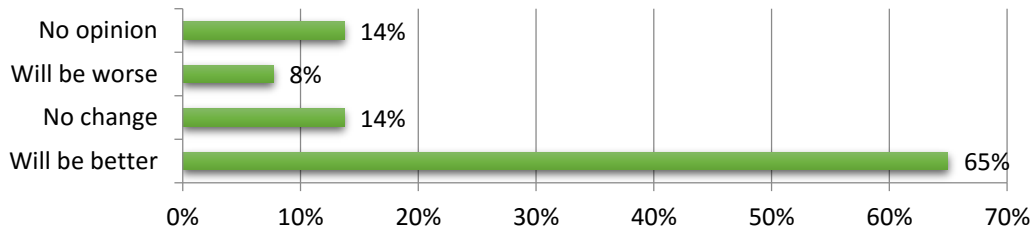
Figure 91: Business climate today vs. 5 years ago



Note: 125 respondents

65% of respondents (76 businesses) expect that the business climate will be better 5 years from today. 8% (9 businesses) expect that it will be worse.

Figure 92: Business climate 5 years from today

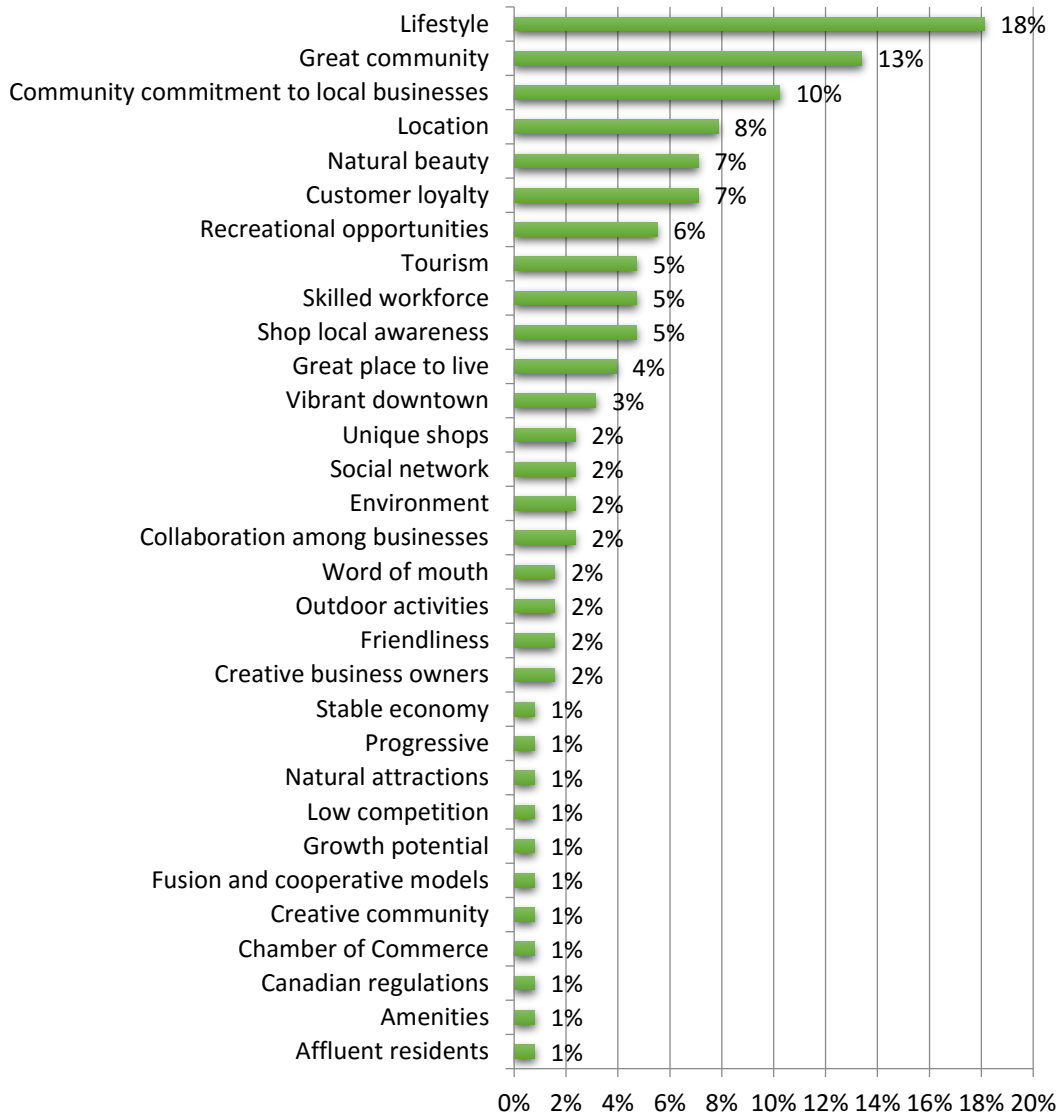


Note: 117 respondents

Strengths and Weaknesses of Business Climate

146 responses were provided when respondents were asked to list the community's strengths as a place to do business, the highest number of responses (18% or 23 responses) cited the lifestyle as the community's strength. 13% (17 businesses) indicated the great community, and 10% (13 businesses) indicated the community commitment to local businesses.

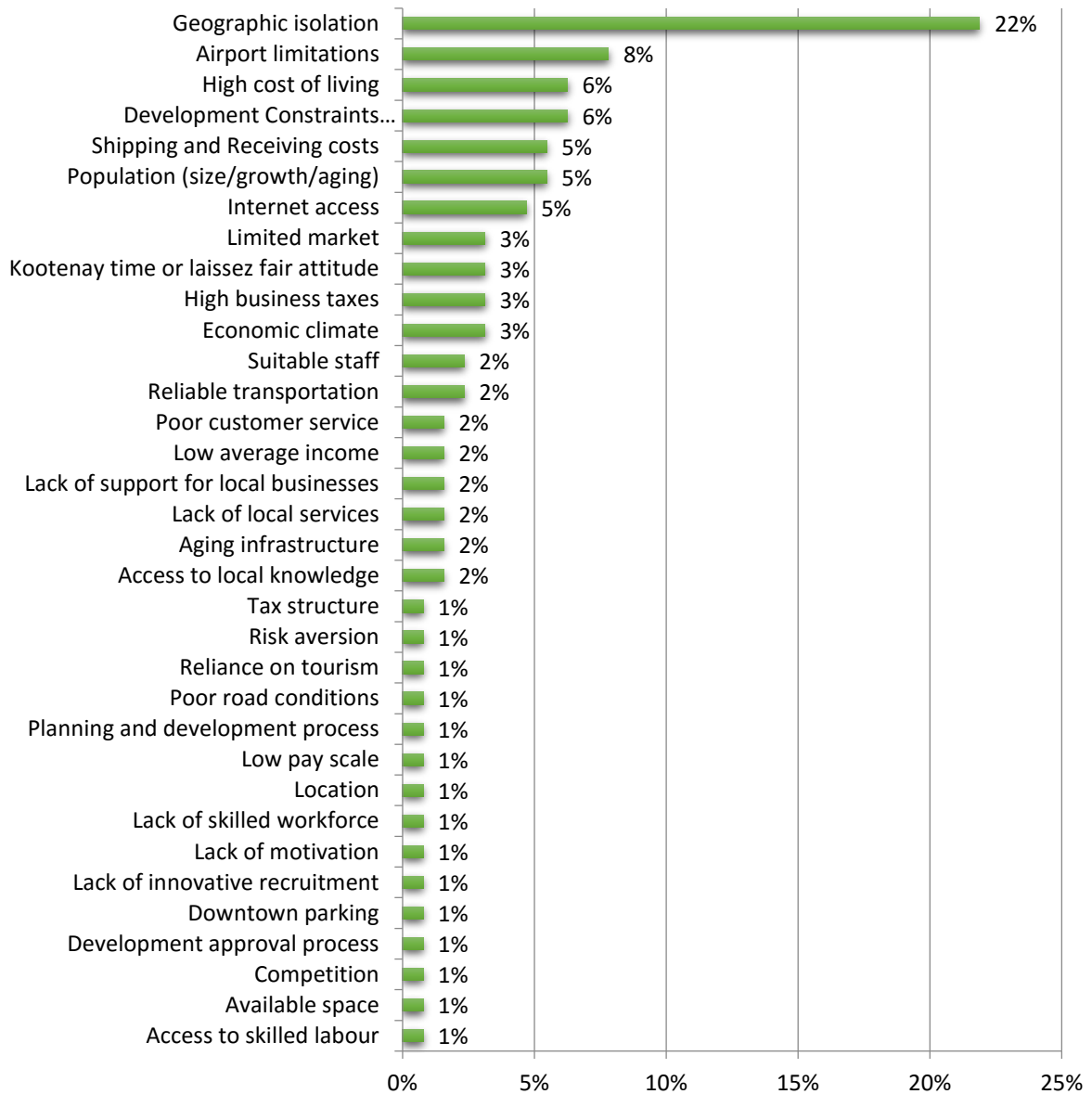
Figure 93: Community's strengths as a place to do business



Note: 127 respondents

Respondents were asked to list the community's weaknesses as a place to do business. The highest number of responses (22% or 28 respondents) was received for the geographic isolation. The airport limitations were cited by 8% of respondents (10 businesses), while the high cost of living and development constraints (e.g. zoning, bureaucracy, permits) were cited by 6% of respondents (8 businesses) respectively.

Figure 94: Community's weaknesses as a place to do business

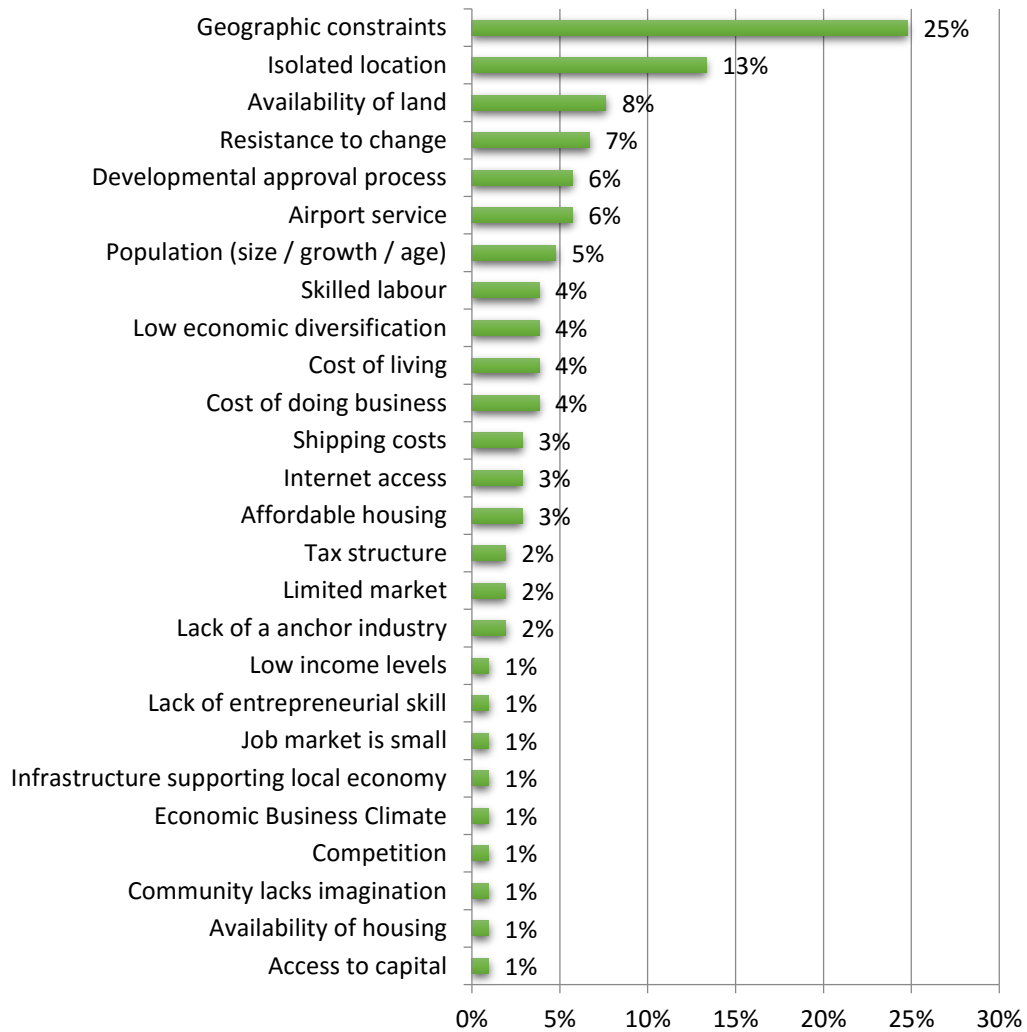


Note: 128 respondents

Business Growth

85% of respondents (106 businesses) indicated that there are barriers to growth. The highest number of respondents (25% or 26 businesses) stated that the geographic constraint is an important barrier to growing the community’s economy. Other commonly cited barriers include isolated location (13% or 14 businesses), availability of land (8% or 8 businesses), and resistance to change (7% or 7 businesses).

Figure 95: Barriers to growth in the community



Note: 105 respondents

The following excerpts illustrate the barriers cited:

“Area as a whole is not well served by geographical expanse. Big area with few people.”

“Lack of space, limited space to grow.”

“Need more industry in Nelson, not just tourism.”

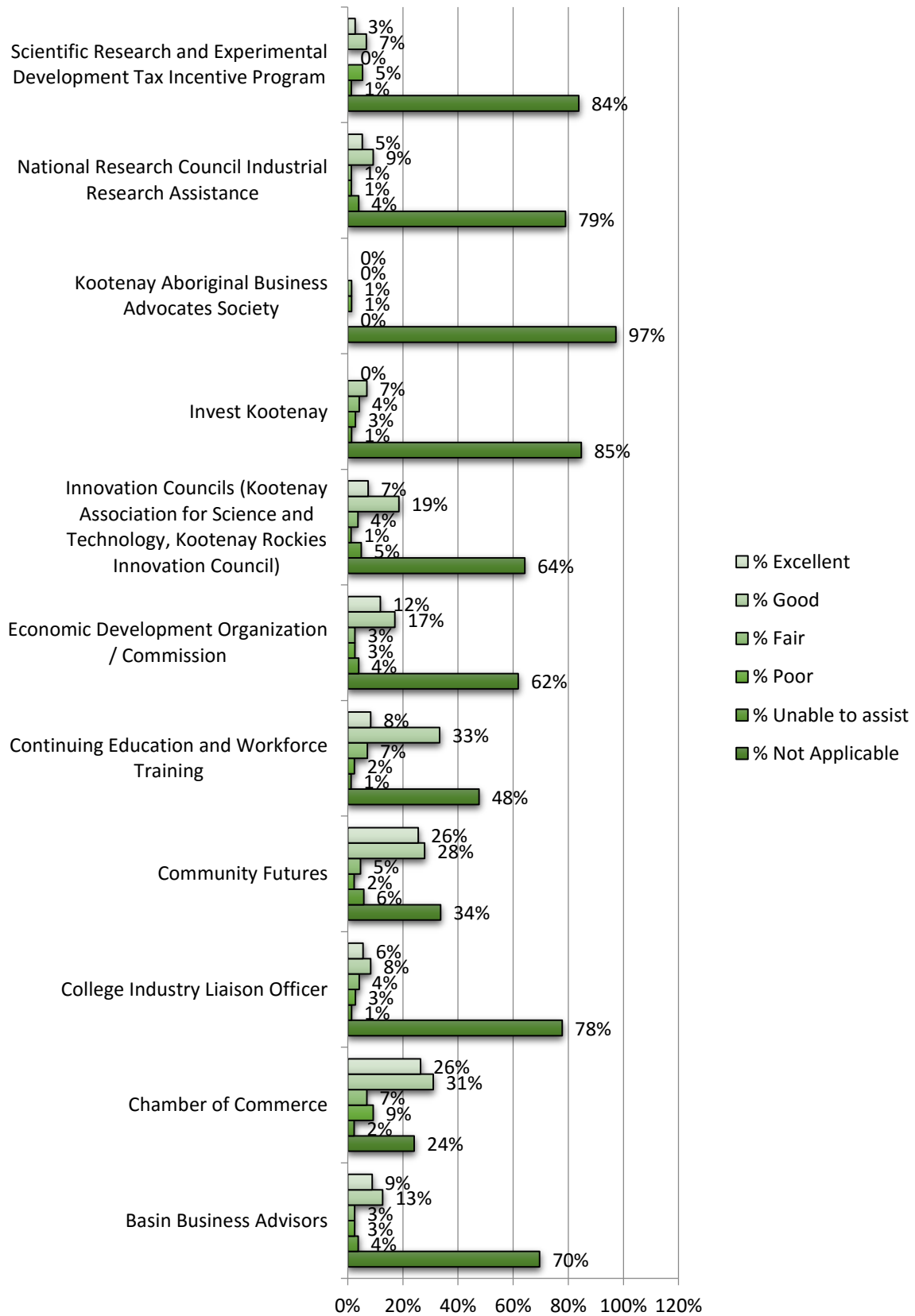
“Physical/geographical distance from major centres.”

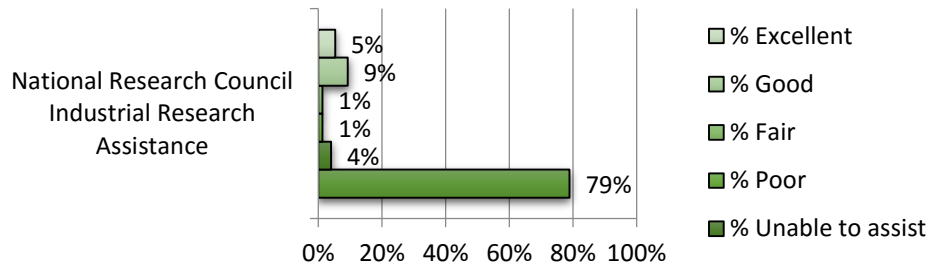
“Transportation, airport - people can't live here as they need to travel for work.”

Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest Poor response (9% or 8 businesses), as well as the highest Excellent response (26% or 23 businesses), high responses were also received

for Good (31% or 27 businesses) and Fair (7% or 6 businesses). Community Futures was cited as providing an excellent level of service by 26% of respondents (22 businesses). Respondents found the Community Futures (6% or 5 businesses) and Innovation Councils (5% or 4 businesses) most commonly unable to assist.

Figure 96: Level of service from business support providers

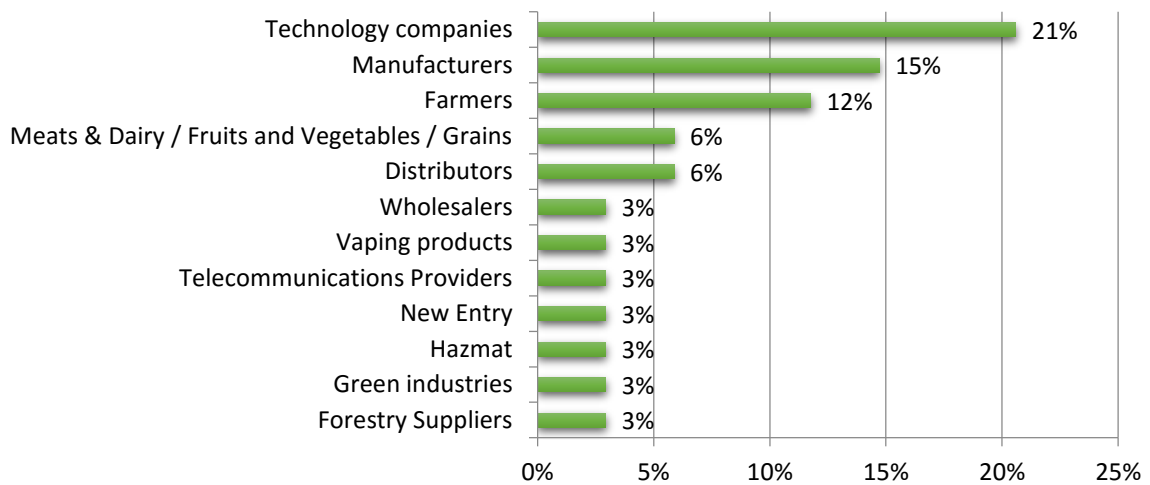




Note: # of respondents varies

43% of respondents (49) indicated that there are suppliers that could locate in the region. Technology companies was most commonly cited by 21% of respondents (7 businesses), with manufacturers being mentioned by 15% (5 businesses).

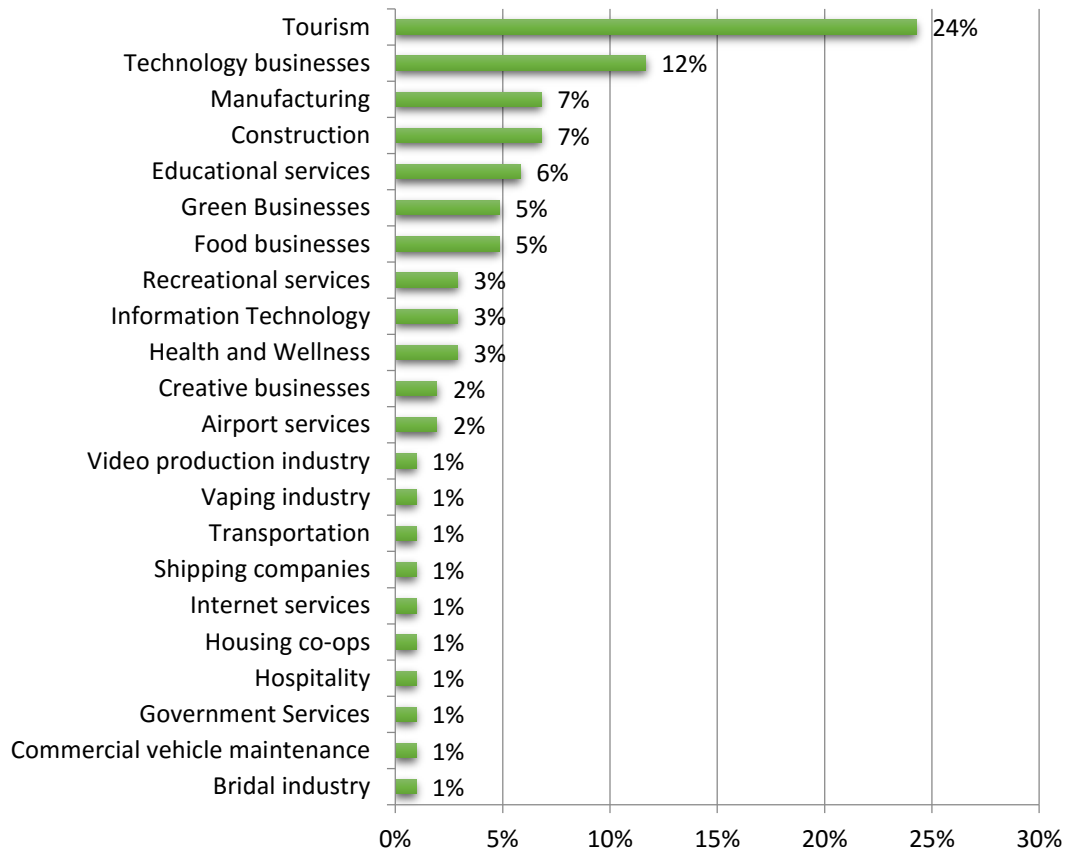
Figure 97: Potential Suppliers



Note: 34 respondents

When asked what business, sector or industry could be attracted to most strategically benefit the industry, the most common response was tourism (24% or 25 respondents) and technology businesses (12% or 12 businesses).

Figure 98: Sectors, businesses or industries that could be attracted to region

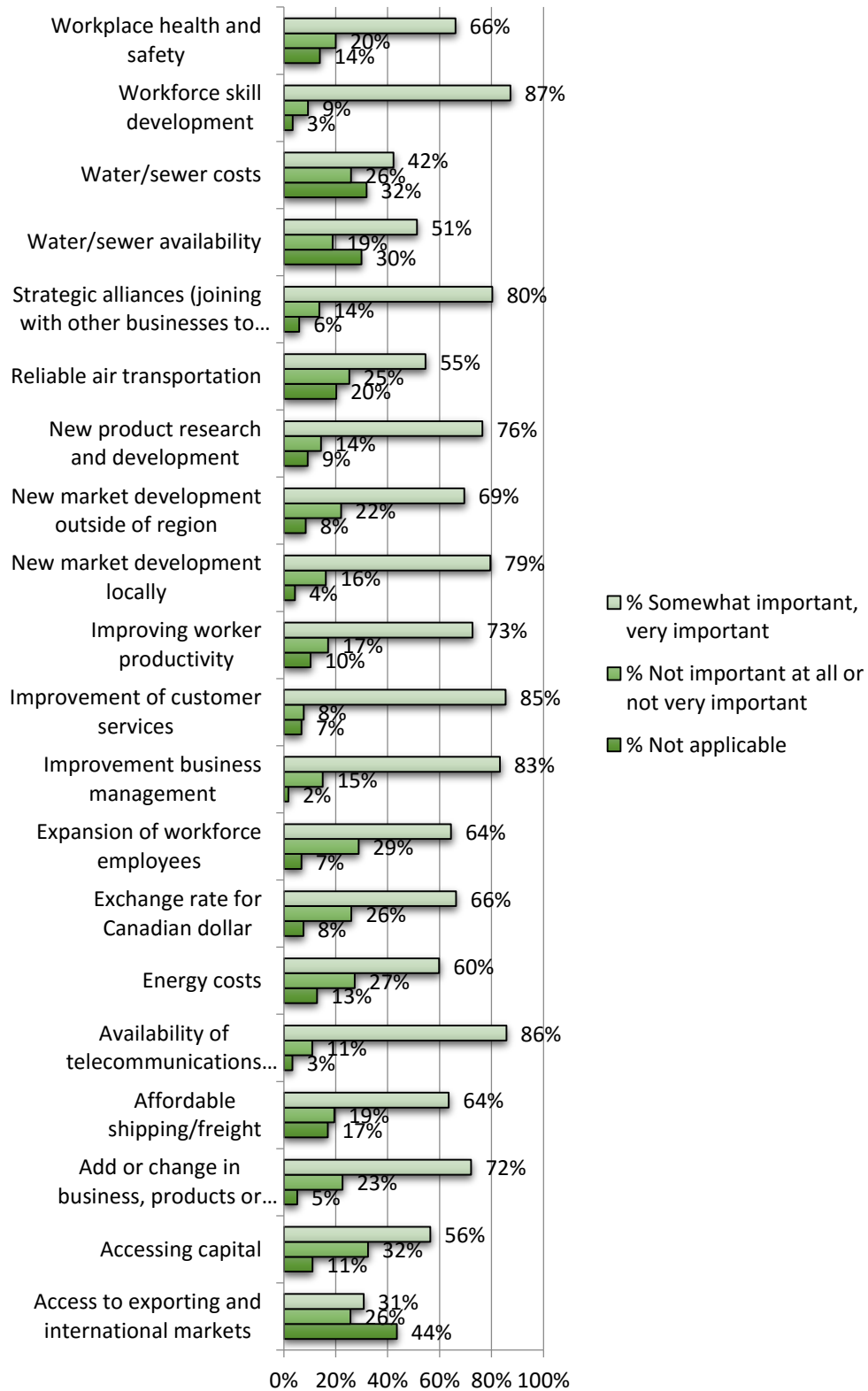


Note: 103 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include workforce skill development (87% or 103 businesses), availability of telecommunications infrastructure and services (86% or 102 businesses) and improvement of customer services (85% or 100 businesses).

Figure 99: Importance of business competitiveness factors

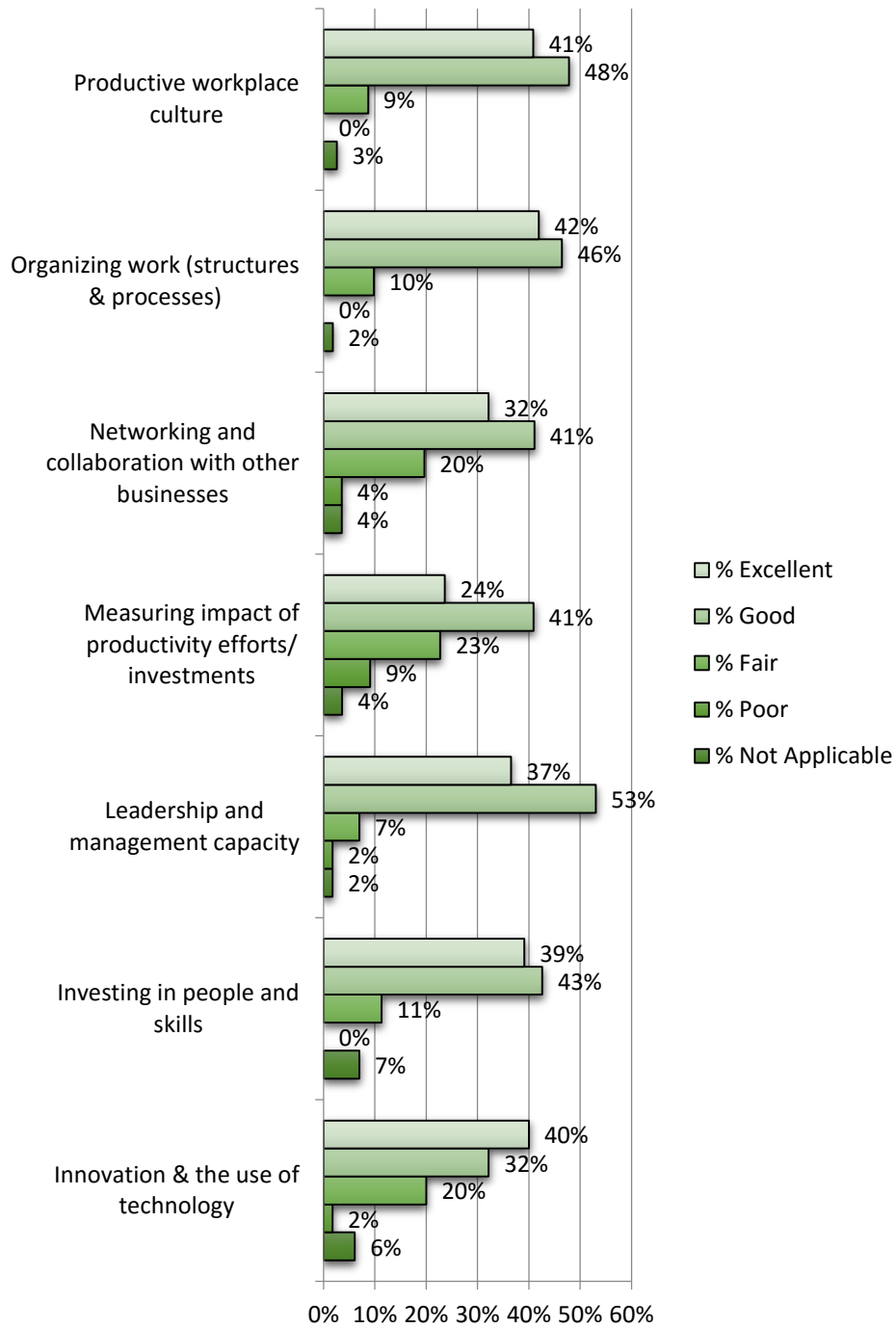


Note: # of respondents varies

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

- **EXCELLENT** ratings include organising work (structure and processes) (23% or 10 businesses) and productive workplace culture (41% or 47 businesses);
- **GOOD** ratings include leadership and management capacity (53% or 61 businesses) and productive workplace culture (48% or 55 businesses);
- **FAIR** ratings include measuring impact of productivity efforts/investments (23% or 25 businesses);
- **POOR** ratings include measuring impact of productivity efforts/investments. (9% or 10 businesses).

Figure 100: Performance on key productivity drivers



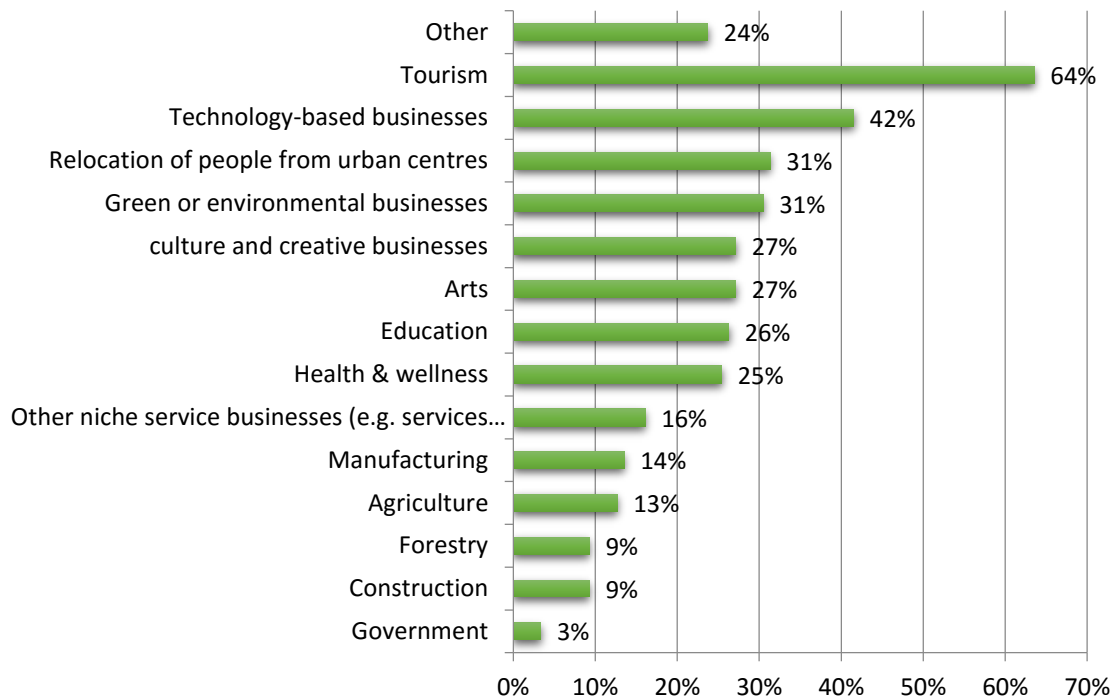
Note: # of respondents varies

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (64% or 75 businesses), technology based businesses (42% or 49 businesses), relocation of people from urban centres (31% or 37 businesses) and green or

environmental businesses (31% or 36 businesses). For a list of drivers identified as “other”, refer to Appendix A.

Figure 101: Economic drivers with greatest growth potential

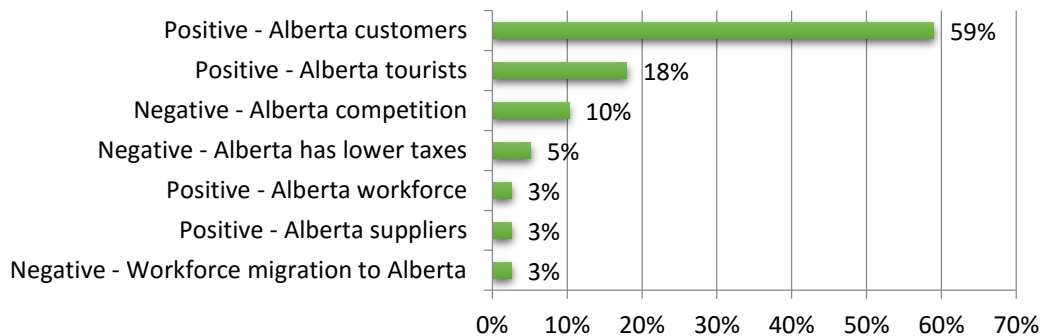


Note: 118 respondents

Proximity to Alberta

42 respondents (42%) reported that they were impacted by their proximity to Alberta. The positive impact of Alberta customers was the most significantly noted by 59% of respondents (23 businesses), while 18% (7 businesses) indicated a similar positive impact of tourism from Alberta.

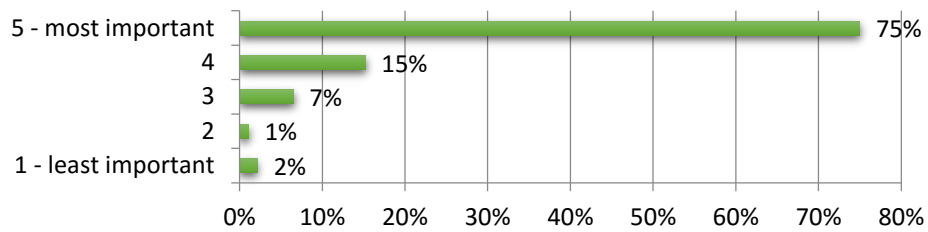
Figure 102: Impact of Proximity to Alberta



Note: 39 respondents

Access to reliable internet service proved to be a very important factor for the success of the businesses surveyed with 75% of businesses indicating it was very important (69 businesses).

Figure 103: Access to Reliable Internet Service



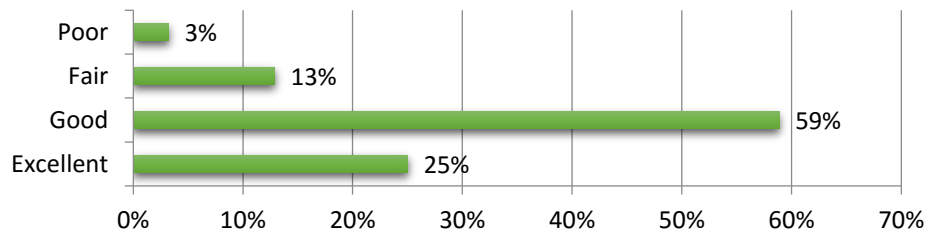
Note: 92 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (59% or 73 businesses), 25% (31 businesses) reported that their company's health is excellent and 13% (16 business) reported that it is fair. 3% (4 businesses) of respondents indicated that their company is in poor health.

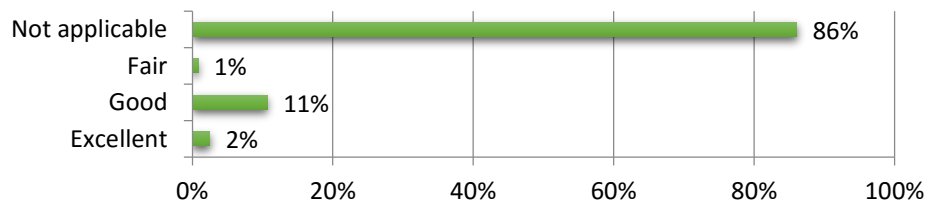
Figure 104: Facility's overall health



Note: 124 respondents

Most businesses with a parent company indicated that the health of that parent company is good (11% or 13 businesses).

Figure 105: Overall health of parent company

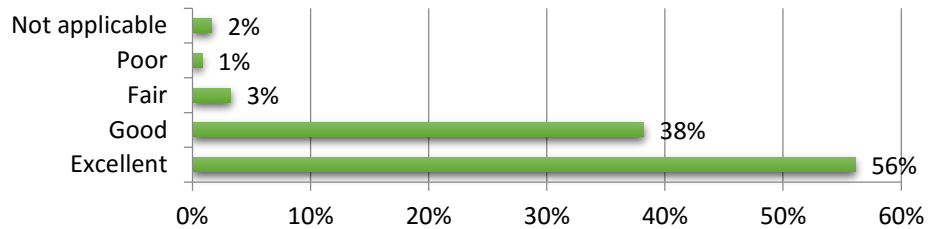


Note: 122 respondents

Attitude toward Community

56% of respondents (69 businesses) indicated that their local management's attitude toward the community is excellent and 38% (47 businesses) indicated that it is good.

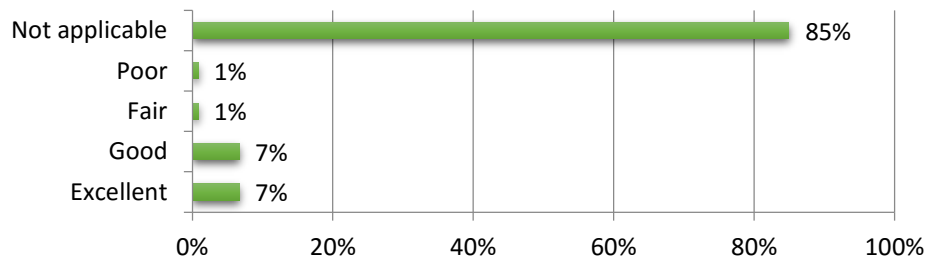
Figure 106: Local management's attitude toward community



Note: 123 respondents

Respondents indicated that their parent company's attitude toward the local community is either excellent or good (7% or 10 businesses).

Figure 107: Parent company's attitude toward local community

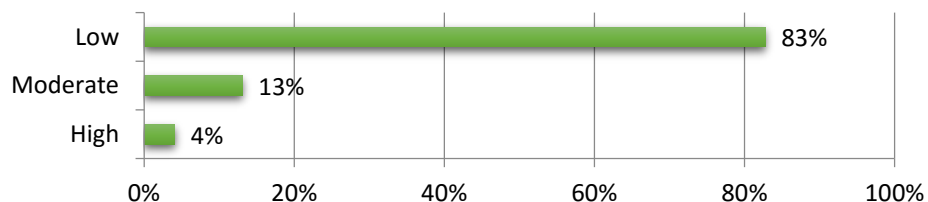


Note: 120 respondents

Risk of Closing or Downsizing

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

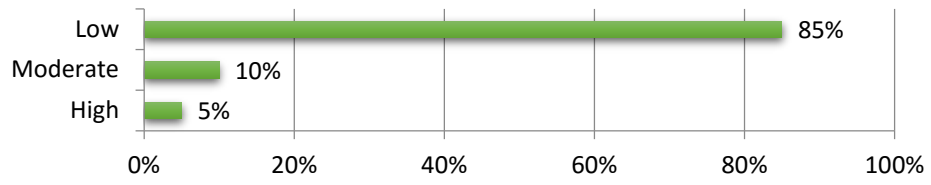
Figure 108: Risk of facility closing



Note: 122 respondents

Similarly, the data indicates that the risk of downsizing is low, with 5% (6 businesses) indicating that risk is high.

Figure 109: Risk of facility downsizing



Note: 120 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by economic development organizations in the City of Nelson 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 the community’s Official Community Plan (OCP).

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

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 2,498 employees. The majority (62%) of employees are full-time. The size of the workforce appears stable and healthy, with 53% of businesses indicating that the number of employees at their business has stayed the same, and 36% indicating that the number has increased. The majority of businesses felt the availability of qualified workers was fair (33%) or poor (29%), and that most businesses (85%) recruited locally. 65% of businesses indicated that the positions they hired in the previous 12 months were hard to fill due to applicants not meeting motivation/attitude/interpersonal abilities, or skill requirements, or simply due to not enough applicants. With 41% of businesses indicating that they currently face recruitment challenges, 38% anticipating future difficulties, and 29% of businesses stating they did not engage in any recruitment activities, there is an indication that actions to support and expand recruitment efforts, and education/training on recruitment techniques could prove helpful. Additionally, only 42% of surveyed businesses believed that there were strategies that could address employee recruitment. Those strategies cited include training, education, affordable housing and subsidized wages. Related to recruitment and retention, are the critical considerations for employees identified which include the cost of living, housing, childcare, and transportation.

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. A related issue is the most commonly reported wage for entry level workers of \$10 and under. The provincial minimum wage is \$10.45, and this may affect the ability to attract entry level workers. Increasing youth employment may assist in addressing the recruitment challenges that 41% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

Business Growth & Expansion

52% of businesses in the region report being in a growth cycle and 35% are maturing. 51% indicate that they are planning to expand within the next three years. Over half (63%) of those businesses planning to expand feel their existing site is adequate. Businesses also report that employment rates are stable or increasing, and that they anticipate continued stability or an increase to the amount of full-time employment over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive report on local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Support could come in the form of assistance with navigating local regulations, identifying and securing new sites, exploring financing options, and connecting businesses with resources to assist in expansion projects. These potential actions and any others, should be designed to address the stated barriers to expansion which include financing and lack of suitable premises. It is worth noting that very few (25%) businesses sought assistance with

expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Small and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small (46% have fewer than five employees, are located in a facility that is less than 1,000 sq. ft., and 31% have annual sales of \$100,000 to \$499,999), and independent (just 15% have other locations). Additionally, 28% of respondents are interested in operating out of a co-working space. The customer base for businesses appears to be diverse, with 36% businesses indicating that just 1 – 9% of their sales are generated by their top three customers. Tailoring supports and services to small, independent businesses will benefit businesses in the Nelson area. Services and supports should consider that 87% of functions provided by a business is 'services'.

Supply Sourcing and Procurement

The data indicates that 40% of supplies come from within the local region. The most common response (68%) for the reason why supplies are sourced outside of the local area is that they are not available locally. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Local businesses do not appear to engage actively with government procurement processes, with only 29% of businesses indicated that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

Businesses identified a need for training in the areas of sales/marketing, computer skills, and safety/first aid/food safe. Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 50% of businesses *do* have a training budget, and that they have a preference for online/webinar training (59%), classroom (58%), or individual coaching (49%) style formats. Additionally, 70% of businesses were interested in training to support adopting technologies to grow their business, with most respondents interested in one-on-one training or workshop formats. 87% of businesses ranked workforce skill development as either somewhat or very important for ensuring business competitiveness. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with local educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 24% of respondents indicated that they have a formal succession plan and half have an up-to-date

business plan. With 41% of businesses indicating that they have been in business for more than 20 years, succession planning is timely for many. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future 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.

Airport Service

A recurring theme was the poor access to airport facilities. In this case, the most frequently used airport is the West Kootenay Regional Airport in Castlegar. The most frequently requested improvements to this airport are related to improving the reliability of flights, with 40% requesting improvements to navigational aids, and 35% requesting that flight reliability be improved. The most frequently cited community weakness was the geographic isolation. Geographic constraints were also cited as an important barrier to growing the community's economy. The difficulty accessing the area can be linked to the airport access issues. With tourism identified by 64% as the economic driver with greatest growth potential, as well as the most frequently cited sector that could be attracted to the region, reliable airport access is critical. Continued work on the issue of increased airport reliability is supported by the businesses surveyed as part of the BRE survey.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Construction	23	6	5%
Manufacturing	31-33	25	19%
Retail and Wholesale Trade	41-45	21	16%
Information and Cultural Industries	51	8	6%
Professional, Scientific and Technical Services	54	32	25%
Administrative Support, Waste Management and Remediation	56	2	2%
Educational Services	61	6	5%
Health Care and Social Assistance	62	5	4%
Arts, Entertainment and Recreation	71	7	5%
Accommodation and Food Services	72	10	8%
Other Services	81	6	5%
Public Administration	91-92	1	1%
Total		129	100%

Survey Participants: 129
 Question Respondents: 129
 No Response Count: 0
 Response Rate: 100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Warehousing	20	16%
Distribution	26	20%
Manufacturing	27	21%
Engineering/RD	31	24%
Headquarters	53	42%
Services	111	87%
Total	268	

Survey Participants: 129
 Question Respondents: 127
 No Response Count: 2

Response Rate:

98%

Figure 3: Who are your competitors?: Where are your competitors located?	Count	Percent of Question Respondents
In Canada	10	10%
In Province	14	14%
Outside Canada	15	15%
In Region	69	70%
None	1	1%
Total	109	

Survey Participants: 129

Question Respondents: 98

No Response Count: 31

Response Rate: 76%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Adaptability	1	0.79%
Advertising	1	0.79%
Branding	1	0.79%
Natural resources	1	0.79%
Tourism	1	0.79%
Workforce	1	0.79%
Knowledge	2	1.57%
Hard work	3	2.36%
Lifestyle	3	2.36%
Networking	3	2.36%
Deversified product / services	4	3.15%
Demand for products and services	5	3.94%
Competitive pricing	6	4.72%
Customer loyalty	6	4.72%
Experience	6	4.72%
Reputation	6	4.72%
Word of mouth	6	4.72%
Lack of competition	7	5.51%
Niche product	7	5.51%
Knowledgeable staff	8	6.30%
Location	12	9.45%
Community support	19	14.96%
Quality product / service	22	17.32%

Customer service	23	18.11%
Total	154	

Survey Participants: 129
 Question Respondents: 127
 No Response Count: 2
 Response Rate: 98%

Figure 5: Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Natural resources	1	1%
Business expansion	2	2%
Connections to the community	2	2%
Experience in the business	2	2%
Born and raised here	4	4%
Great community	5	5%
Bought an existing business	6	6%
Close to family	7	7%
Established business	9	9%
Location	15	15%
Business opportunity	17	17%
Lifestyle	19	19%
Already living here	20	20%
Total	109	

Survey Participants: 129
 Question Respondents: 101
 No Response Count: 28
 Response Rate: 78%

Figure 6: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	19	15%
No	107	85%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 7: Does this company have another location elsewhere?: If Yes, where?	Count	Percent of Question Respondents
Elsewhere in nation	4	29%
In Province	11	79%
Total	15	

Survey Participants: 129
 Question Respondents: 14
 No Response Count: 5
 Parent Question 'Yes' Respondents: 19
 Parent Question Respondents: 126
 Response Rate: 74%

Figure 8: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	1	1%
Elsewhere in nation	4	3%
In Province	111	96%
Total	116	

Survey Participants: 129
 Question Respondents: 116
 No Response Count: 13
 Response Rate: 90%

Figure 8b: Location of company's headquarters: Province	Count	Percent of Question Respondents
AB	1	1.12%
ON	1	1.12%
QC	1	1.12%
SK	1	1.12%
BC	85	95.51%
Total	89	

Survey Participants: 129
 Question Respondents: 89
 No Response Count: 40
 Response Rate: 69%

Figure 8c: Location of company's headquarters: Nation	Count	Percent of Question Respondents
United States	1	1.20%
Canada	82	98.80%
Total	83	

Survey Participants: 129
 Question Respondents: 83
 No Response Count: 46
 Response Rate: 64%

Figure 8d: Corporate headquarters location, if different than local location	Count	Percent of Question Respondents
Balfour BC	1	7.14%
Canada	1	7.14%
Cranbrook BC	1	7.14%
Saskatoon BC	1	7.14%
Castlegar BC	2	14.29%
Toronto Ont	2	14.29%
Nelson BC	4	28.57%
Total	12	

Survey Participants: 129
 Question Respondents: 14
 No Response Count: 115
 Response Rate: 11%

Figure 9: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	3	2%
Emerging	14	11%
Growing	66	52%
Maturing	44	35%
Total	127	

Survey Participants: 129
 Question Respondents: 127
 No Response Count: 2
 Response Rate: 98%

Figure 10: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	5	4%
1-4 Years	16	12%
5-9 Years	22	17%
10-19 Years	33	26%
>20 Years	53	41%
Total	129	

Survey Participants: 129
 Question Respondents: 129
 No Response Count: 0
 Response Rate: 100%

Figure 11: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	6	5%
Privately owned	113	95%
Total	119	

Survey Participants: 129
 Question Respondents: 119
 No Response Count: 10
 Response Rate: 92%

Figure 11b: What is this company's legal status?	Count	Percent of Question Respondents
Limited liability partnership (LLP)	4	3%
Partnership	6	5%
Non-profit	8	6%
Sole proprietorship	38	30%
Corporation	64	51%
Other	6	5%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 11c: What is this company's legal status?: If <i>Other</i>, please specify	Count	Percent of Question Respondents
Community Contribution Corporation CCC	1	0.79%
Limited company	1	0.79%
Co-operative	2	1.59%
Partnership/Corporation	2	1.59%
Total	6	

Survey Participants: 129
 Question Respondents: 6
 No Response Count: 0
 Parent Question 'Other' Respondents: 6
 Parent Question Respondents: 126
 Response Rate: 100%

Figure 12: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	29	22%
No	100	78%
Total	129	

Survey Participants: 129
 Question Respondents: 129
 No Response Count: 0
 Response Rate: 100%

Figure 12b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Neutral	3	10.34%
Positive	26	89.66%
Total	29	

Survey Participants: 129
 Question Respondents: 29
 No Response Count: 0
 Parent Question 'Yes' Respondents: 29
 Parent Question Respondents: 129
 Response Rate: 100%

Figure 12c: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	23	18.25%
No	103	81.75%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 13: If Yes what is the anticipated time frame	Count	Percent of Question Respondents
1 year or less	5	24%
2 years	3	14%
3 years or more	13	62%
Total	21	

Survey Participants: 129
 Question Respondents: 21
 No Response Count: 2
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 126
 Response Rate: 91%

Figure 14: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Close the business down	1	5%
Sell to another company	4	18%
Sell/transfer to a family member	6	27%
Sell/transfer to a non-family member	10	45%
Other	1	5%
Total	22	

Survey Participants: 129
 Question Respondents: 22
 No Response Count: 1
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 126

Response Rate: 96%

Figure 14b: If Yes, how do you intend to exit the business?: If other, please explain	Count	Percent of Question Respondents
Forming a Co-operative	1	4.55%
Total	1	

Survey Participants: 129
 Question Respondents: 1
 No Response Count: 0
 Parent Question 'Other' Respondents: 1
 Parent Question Respondents: 22
 Response Rate: 96%

Figure 15: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	29	24%
No	87	73%
Not applicable	4	3%
Total	120	

Survey Participants: 129
 Question Respondents: 120
 No Response Count: 9
 Response Rate: 93%

Figure 15b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	24	20.00%
No	96	80.00%
Total	120	

Survey Participants: 129
 Question Respondents: 120
 No Response Count: 9
 Response Rate: 93%

	Count	Percent of Question Respondents

Figure 15c: If Yes, have you been assisted in preparation of a succession plan?		
Yes	13	61.90%
No	8	38.10%
Total	21	

Survey Participants: 129
 Question Respondents: 21
 No Response Count: 8
 Parent Question 'Yes' Respondents: 29
 Parent Question Respondents: 120
 Response Rate: 72%

Figure 15d: If Yes, by whom	Count	Percent of Question Respondents
Accountant	1	7.69%
Lawyer	1	7.69%
Other	11	84.62%
Total	13	

Survey Participants: 129
 Question Respondents: 13
 No Response Count: 0
 Parent Question 'Yes' Respondents: 13
 Parent Question Respondents: 21
 Response Rate: 100%

Figure 15e: If Yes, by whom: If other, please explain	Count	Percent of Question Respondents
Board members	1	7.69%
Mentor	1	7.69%
Board of Directors	2	15.38%
Business partner	2	15.38%
In house	2	15.38%
Accountant	3	23.08%
Total	11	

Survey Participants: 129
 Question Respondents: 11
 No Response Count: 0
 Parent Question 'Other' Respondents: 11

Parent Question Respondents: 13
 Response Rate: 100%

Figure 16: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	63	50%
No	63	50%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 17: What forms of technology do you currently use in your business?	Count	Percent of Question Respondents
CRM	29	32%
Point of Sale system	44	49%
Remote Data Backup	55	61%
File Sharing	60	67%
Other	62	69%
Total	250	

Survey Participants: 97
 Question Respondents: 90
 No Response Count: 7
 Response Rate: 93%

LOCAL WORKFORCE

Figure 18: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	59	46%
5 - 10	27	21%
11 - 19	16	13%
20-49	12	9%
50-99	7	5%
Over 100	7	5%
Total	128	

Total employees: 2498

Survey Participants: 129

Question Respondents: 128
 No Response Count: 1
 Response Rate: 99%

Figure 19: Nature of Employment	Count	Percent of Question Respondents
Full Time	1558	62%
Part Time	755	30%
Temporary	185	7%
Total	2498	

Survey Participants: 129
 Question Respondents: 128
 Response Rate: 99.22%

Figure 19b: Total number of employees at this facility*: Full-time employees	Count	Percent of Question Respondents
Less than 5	82	64.06%
5 - 9	18	14.06%
10 – 19	8	6.25%
20-49	12	9.38%
50-99	4	3.12%
Over 100	4	3.12%
Total	128	

Total full-time employees: 1558
 Survey Participants: 129
 Question Respondents: 128
 No Response Count: 1
 Response Rate: 99%

Figure 19c: Total number of employees at this facility*: Part-time employees	Count	Percent of Question Respondents
Less than 5	105	82.03%
5 - 9	7	5.47%
10 - 19	5	3.91%
20-49	6	4.69%
50-99	4	3.12%
Over 100	1	0.78%
Total	128	

Total part-time employees: 755
 Survey Participants: 129

Question Respondents: 128
 No Response Count: 1
 Response Rate: 99%

Figure 19d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	115	89.84%
5 - 9	7	5.47%
10 – 19	3	2.34%
20-49	3	2.34%
Total	128	

Total temporary employees: 185
 Survey Participants: 129
 Question Respondents: 128
 No Response Count: 1
 Response Rate: 99%

Figure 20: Historical employment trend	Count	Percent of Question Respondents
Declining	14	11%
Staying the same	66	53%
Increasing	45	36%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 20b: Projected number of employees at this facility in three years*	Count	Percent of Question Respondents
Less than 5	51	39.84%
5-9	27	21.09%
10-19	17	13.28%
20-49	18	14.06%
50-99	6	4.69%
Over 100	9	7.03%
Total	128	

Survey Participants: 129
 Question Respondents: 128
 No Response Count: 1

Response Rate: 99%

Figure 20c: Projected number of employees at this facility in one year*	Count	Percent of Question Respondents
Less than 5	55	43.65%
9-May	28	22.22%
19-Oct	15	11.90%
20-49	14	11.11%
50-99	7	5.56%
Over 100	7	5.56%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 21: How did the number of staff change, if at all, in the last 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	35	28%
Stayed the same	74	59%
Decreased	16	13%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 21b: How did the number of staff change, if at all, in the last 3 years?: Part-time	Count	Percent of Question Respondents
Increased	30	28.04%
Stayed the same	65	60.75%
Decreased	12	11.21%
Total	107	

Survey Participants: 129
 Question Respondents: 107
 No Response Count: 22
 Response Rate: 83%

Figure 21c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	12	15.79%
Stayed the same	62	81.58%
Decreased	2	2.63%
Total	76	

Survey Participants: 129
 Question Respondents: 76
 No Response Count: 53
 Response Rate: 59%

Figure 22: How do you expect the number of staff to change, if at all over the next 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	49	40%
Stayed the same	68	56%
Decreased	5	4%
Total	122	

Survey Participants: 129
 Question Respondents: 122
 No Response Count: 7
 Response Rate: 95%

Figure 22b: How do you expect the number of staff to change, if at all over the next 3 years?: Part-time	Count	Percent of Question Respondents
Increased	42	38.53%
Stayed the same	63	57.80%
Decreased	4	3.67%
Total	109	

Survey Participants: 129
 Question Respondents: 109
 No Response Count: 20
 Response Rate: 84%

Figure 22c: How do you expect the number of staff to change, if at all over the next 3 years?: Casual	Count	Percent of Question Respondents
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Increased	16	21.33%
Stayed the same	59	78.67%
Total	75	

Survey Participants: 129
 Question Respondents: 75
 No Response Count: 54
 Response Rate: 58%

Figure 23: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	7	6%
26 - 34	27	23%
35 - 49	62	53%
50 or older	21	18%
Total	117	

Survey Participants: 129
 Question Respondents: 117
 No Response Count: 12
 Response Rate: 91%

Figure 23b: What percentage (%) of your workforce is under the age of 25?	Count	Percent of Question Respondents
less than 25%	65	73.03%
25 to 49%	15	16.85%
50 to 74%	6	6.74%
75 to 100%	3	3.37%
Total	89	

Survey Participants: 97
 Question Respondents: 89
 No Response Count: 8
 Response Rate: 92%

Figure 23c: What percentage (%) of your workforce is under the age of 55?	Count	Percent of Question Respondents
less than 25%	12	13.48%
25 to 49%	4	4.49%
50 to 74%	10	11.24%
75 to 100%	63	70.79%
Total	89	

Survey Participants: 97
 Question Respondents: 89
 No Response Count: 8
 Response Rate: 92%

Figure 24: Have you hired/or attempted to hire additional staff in the previous 12 months.	Count	Percent of Question Respondents
Yes	67	71%
No	28	29%
Total	95	

Survey Participants: 97
 Question Respondents: 95
 No Response Count: 2
 Response Rate: 98%

Figure 24b: Of the new hires in the past 12 months, how many were previously laid-off employees who were re-hired?
168

Survey Participants: 97
 Question Respondents: 59
 No Response Count: 8
 Parent Question 'Yes' Respondents: 67
 Parent Question Respondents: 95
 Response Rate: 88%

Figure 25: Employment Type	Number of Hires	Percent of New Hires
Apprentices	9	1%
Managers and Executives	25	3%
Trades (Journey person)	32	4%
Sales and Marketing	35	4%
Professionals (eg. Engineers, Accountants)	40	5%
Technical	42	5%
Administrative and Clerical	50	6%
Labourer	95	12%

Production Worker	179	22%
Service Worker	291	36%
Total	798	

Figure 25b: Please list the three occupations for which you hired the most employees over the last 12 months along with the total number of employees for each: Occupation 1	Number of Hires	Percent of New Hires
Hair stylist	1	0.14%
Project coordinator	1	0.14%
Designer/drafting	1	0.14%
Chinese Medicine practioner	1	0.14%
Cabinet maker	1	0.14%
Maintenance workers	1	0.14%
Bookkeepers	1	0.14%
Youth worker	2	0.28%
Architect	2	0.28%
Designers	2	0.28%
Mechanical engineers	2	0.28%
Equipment operator	2	0.28%
Installers	2	0.28%
Office assistants	2	0.28%
Chefs	2	0.28%
Brewers	2	0.28%
Wood/Metal/Graphics workers	2	0.28%
Marketers	2	0.28%
Room attendent	3	0.43%
Apprentice	3	0.43%
Counselors	3	0.43%
Mill workers	3	0.43%
Computer Programmers	4	0.57%
Technical writers	4	0.57%
Aesthetician	4	0.57%
Technicians	4	0.57%
Summer students	5	0.71%
Accountants	5	0.71%
Automotive technicians	5	0.71%
Finisher	6	0.85%

Childcare workers	6	0.85%
Trades persons	7	1.00%
Managers	8	1.14%
Consultants	9	1.28%
Computer Technicians	10	1.42%
Servers, Cooks	12	1.71%
Administrative	12	1.71%
Cooks	13	1.85%
Massage Therapists	13	1.85%
Labourer	13	1.85%
Guides	15	2.13%
Instructors	17	2.42%
Lift Attendant	20	2.84%
Physicians	20	2.84%
Service workers	30	4.27%
Sales	36	5.12%
Servers	37	5.26%
Support workers	47	6.69%
Staff	51	7.25%
Drivers	55	7.82%
Housekeepers	63	8.96%
Clerks	131	18.63%
Total	703	

Survey Participants: 97
Question Respondents: 65
No Response Count: 32
Response Rate: 67%

Figure 26: Education	Number of Hires	Percent of New Hires
Undergraduate degree	27	3%
Some post-secondary education	27	3%
College diploma	49	6%
Professional accreditation or graduate degree	54	7%
Trade certificate	67	8%
No Minimum Indicated	266	33%
High school diploma or equivalent	308	39%
Total	798	

Figure 26b Employment	Education	Number	Percent of
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Type		of Hires	New Hires
Administrative and Clerical	College diploma	13	1.63%
Administrative and Clerical	High school diploma or equivalent	17	2.13%
Administrative and Clerical	No Minimum Indicated	5	0.63%
Administrative and Clerical	Professional accreditation or graduate degree	2	0.25%
Administrative and Clerical	Some post-secondary education	10	1.25%
Administrative and Clerical	Undergraduate degree	3	0.38%
Apprentices	No Minimum Indicated	2	0.25%
Apprentices	Some post-secondary education	4	0.50%
Apprentices	Trade certificate	3	0.38%
Labourer	High school diploma or equivalent	14	1.75%
Labourer	No Minimum Indicated	70	8.77%
Labourer	Trade certificate	11	1.38%
Managers and Executives	College diploma	6	0.75%
Managers and Executives	High school diploma or equivalent	3	0.38%
Managers and Executives	No Minimum Indicated	6	0.75%
Managers and Executives	Professional accreditation or graduate degree	2	0.25%
Managers and Executives	Some post-secondary education	4	0.50%
Managers and Executives	Trade certificate	1	0.13%
Managers and Executives	Undergraduate degree	3	0.38%
Production Worker	High school diploma or equivalent	152	19.05%
Production Worker	No Minimum Indicated	25	3.13%
Production Worker	Professional accreditation or graduate degree	2	0.25%
Professionals (eg. Engineers, Accountants)	Professional accreditation or graduate degree	34	4.26%
Professionals (eg. Engineers, Accountants)	Trade certificate	1	0.13%
Professionals (eg. Engineers, Accountants)	Undergraduate degree	5	0.63%
Sales and Marketing	College diploma	1	0.13%
Sales and Marketing	High school diploma or equivalent	14	1.75%
Sales and Marketing	No Minimum Indicated	16	2.01%
Sales and Marketing	Some post-secondary education	1	0.13%
Sales and Marketing	Undergraduate degree	3	0.38%

Service Worker	College diploma	20	2.51%
Service Worker	High school diploma or equivalent	99	12.41%
Service Worker	No Minimum Indicated	133	16.67%
Service Worker	Some post-secondary education	6	0.75%
Service Worker	Trade certificate	28	3.51%
Service Worker	Undergraduate degree	5	0.63%
Technical	College diploma	7	0.88%
Technical	High school diploma or equivalent	6	0.75%
Technical	No Minimum Indicated	7	0.88%
Technical	Professional accreditation or graduate degree	3	0.38%
Technical	Some post-secondary education	2	0.25%
Technical	Trade certificate	9	1.13%
Technical	Undergraduate degree	8	1.00%
Trades (Journeyperson)	College diploma	2	0.25%
Trades (Journeyperson)	High school diploma or equivalent	3	0.38%
Trades (Journeyperson)	No Minimum Indicated	2	0.25%
Trades (Journeyperson)	Professional accreditation or graduate degree	11	1.38%
Trades (Journeyperson)	Trade certificate	14	1.75%
		798	

Figure 27: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
Lower than	18	17%
Same as	54	51%
Greater than	33	31%
Total	105	

Survey Participants: 129
Question Respondents: 105
No Response Count: 24
Response Rate: 81%

Figure 27b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
Under \$10	7	7.53%
\$10-\$12.99	5	5.38%
\$13-\$14.99	6	6.45%
\$15-\$19.99	10	10.75%
\$20-\$29.99	22	23.66%
\$30-49.99	22	23.66%
\$50-\$99	17	18.28%
\$100 or more	4	4.30%

Total	93
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Survey Participants: 129
 Question Respondents: 93
 No Response Count: 36
 Response Rate: 72%

Figure 27c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
Under \$10	13	19.40%
\$10-\$12.99	8	11.94%
\$13-\$14.99	5	7.46%
\$15-\$19.99	16	23.88%
\$20-\$29.99	17	25.37%
\$30-49.99	8	11.94%
Total	67	

Survey Participants: 129
 Question Respondents: 67
 No Response Count: 62
 Response Rate: 52%

Figure 27d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
Under \$10	18	32.14%
\$10-\$12.99	11	19.64%
\$13-\$14.99	11	19.64%
\$15-\$19.99	11	19.64%
\$20-\$29.99	5	8.93%
Total	56	

Survey Participants: 129
 Question Respondents: 56
 No Response Count: 73
 Response Rate: 43%

Figure 28: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	73	84%
Decreasing	1	1%
Increasing	13	15%
Total	87	

Survey Participants: 129
 Question Respondents: 87
 No Response Count: 42
 Response Rate: 67%

Figure 29: How do you rate the availability of qualified workers?	Count	Percent of Question Respondents
Excellent	9	11%
Good	21	27%
Fair	26	33%
Poor	23	29%
Total	79	

Survey Participants: 97
 Question Respondents: 79
 No Response Count: 18
 Response Rate: 81%

Figure 30: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Nationally	3	2%
Internationally	5	4%
Provincially	10	8%
Locally	104	85%
Total	122	

Survey Participants: 129
 Question Respondents: 122
 No Response Count: 7
 Response Rate: 95%

Figure 31: Recruitment and retention challenges	Count	Percent
Retention challenges	28	24%
Recruitment challenges	49	41%

Figure 31b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	28	23.53%
No	91	76.47%
Total	119	

Survey Participants: 129
 Question Respondents: 119
 No Response Count: 10
 Response Rate: 92%

Figure 31c: Is the company experiencing recruitment problems	Count	Percent of Question Respondents
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with any employee positions or skills?		
Yes	49	40.50%
No	72	59.50%
Total	121	

Survey Participants: 129
 Question Respondents: 121
 No Response Count: 8
 Response Rate: 94%

Figure 32: If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.	Count	Percent of Question Respondents
Better paying jobs elsewhere	1	1%
Child Care	1	1%
Cost of living allowance	1	1%
Fair wages	1	1%
Finding employees	1	1%
Signed contract	1	1%
Staff discounts	1	1%
Avoid layoffs (find extra work)	2	2%
Professional development	2	2%
Provide housing	2	2%
Telecommuting	2	2%
Addressing employees needs	4	4%
Bonuses	4	4%
Flexible work schedule	7	8%
Training	7	8%
Support a positive environment	10	11%
Benefits	11	12%
Competitive wages	22	24%
None	29	32%
Total	109	

Survey Participants: 121
 Question Respondents: 90
 No Response Count: 31
 Response Rate: 74%

Figure 33: If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
College recruitment	1	1%
Internal job postings	1	1%
Job Fairs	1	1%
Recruiting Firms	1	1%
Trade Journals	1	1%
Training	1	1%
WorkBC	1	1%
Cooperative education	2	2%
Road side sign	2	2%
Social media (Facebook/ LinkedIn)	2	2%
Online job boards	3	3%
Networking	6	6%
Word of mouth	22	23%
Advertising	33	34%
None	28	29%
Total	105	

Survey Participants: 121
 Question Respondents: 96
 No Response Count: 25
 Response Rate: 79%

Figure 34: Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?	Count	Percent of Question Respondents
Administrative/Clerical	1	2%
Advanced Manufacturing Workers	1	2%
Healthcare Professionals	1	2%
Machine Operators	1	2%
Marketing	1	2%
Assembler/Line Workers	2	4%
Hospitality Service	2	4%
General Laborer	3	6%
Professional/Technical	4	8%
Sales/Service	4	8%

Food/Beverage Service	5	10%
Sales/Retail	5	10%
Prof/Info Tech/Programming	9	18%
Professional/Other	10	20%
Other	32	65%
Total	81	

Survey Participants: 129
Question Respondents: 49
No Response Count: 0
Parent Question 'Yes' Respondents: 49
Parent Question Respondents: 121
Response Rate: 100%

Figure 34b: Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)	Count	Percent of Question Respondents
Bicycle Technicians	1	2.04%
Bookkeepers	1	2.04%
Chemists	1	2.04%
Communication consultants	1	2.04%
Creative Writers	1	2.04%
Customer service representatives	1	2.04%
Executive Director	1	2.04%
Good employee	1	2.04%
Graphic designers	1	2.04%
Guiding trip leaders	1	2.04%
House supervisor	1	2.04%
Housekeeping	1	2.04%
Kitchen Designer	1	2.04%
Painters	1	2.04%
Part time employees	1	2.04%
Registered Massage Therapists (RMTs)	1	2.04%
Skilled trades	1	2.04%
Statisticians	1	2.04%
System administrators	1	2.04%

Technical writers	1	2.04%
Volunteers	1	2.04%
for entry level positions as groundskeepers or retail sales	1	2.04%
professional designer	1	2.04%
younger demographics	1	2.04%
Childcare workers	2	4.08%
Computer technologists	2	4.08%
Software developers	3	6.12%
Web designers	3	6.12%
Total	34	

Survey Participants: 129
 Question Respondents: 28
 No Response Count: 4
 Parent Question 'Other' Respondents: 32
 Parent Question Respondents: 49
 Response Rate: 88%

Figure 35: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	46	38.33%
No	74	61.67%
Total	120	

Survey Participants: 129
 Question Respondents: 120
 No Response Count: 9
 Response Rate: 93%

Figure 35b: Do you anticipate future recruiting difficulties i.e. 3-5 year?: If Yes, in what area(s)?	Count	Percent of Question Respondents
Administrative/Clerical	1	2%
Advanced Manufacturing Workers	1	2%
Electrical/Electronics	1	2%
Healthcare Professionals	1	2%
Hospitality Service	1	2%
Machine Operators	1	2%

Material/Fabricators	1	2%
Mechanics	1	2%
Assembler/Line Workers	3	7%
General Laborer	3	7%
Prof/Info Tech/Programming	5	11%
Sales/Retail	5	11%
Sales/Service	5	11%
Food/Beverage Service	6	13%
Professional/Technical	6	13%
Professional/Other	7	15%
Other	28	61%
Total	76	

Survey Participants: 129
 Question Respondents: 46
 No Response Count: 0
 Parent Question 'Yes' Respondents: 46
 Parent Question Respondents: 120

Figure 35c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)	Count	Percent of Question Respondents
Brewers	1	2.17%
Chemists	1	2.17%
General Laborer	1	2.17%
Guides	1	2.17%
Housekeeping	1	2.17%
Kitchen staff	1	2.17%
Managers	1	2.17%
Service staff	1	2.17%
Statisticians	1	2.17%
Childcare providers	2	4.35%
Skilled trades	2	4.35%
Computer professionals	6	13.04%
Total	19	

Survey Participants: 129
 Question Respondents: 25
 No Response Count: 3
 Parent Question 'Other' Respondents: 28

Parent Question Respondents: 46
 Response Rate: 89%

Figure 36: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	36	42%
No	49	58%
Total	85	

Survey Participants: 129
 Question Respondents: 85
 No Response Count: 44
 Response Rate: 66%

Figure 36b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent of Question Respondents
Better airport	1	2.78%
Business education	1	2.78%
HR training for businesses	1	2.78%
Help with marketing careers	1	2.78%
Increase understanding of employment perspectives	1	2.78%
Job shadowing programs	1	2.78%
Offer human resources workshops	1	2.78%
Promote the area	1	2.78%
Provide a resource	1	2.78%
Provide a wage subsidy	1	2.78%
Sector specific training	1	2.78%
Streamline process to hire temporary foreign workers	1	2.78%
Summer student placement	1	2.78%
Better job advertising	2	5.56%
Establish a job bank	3	8.33%

Subsidize wages	4	11.11%
Support affordable housing	4	11.11%
Provide training and education	8	22.22%
Total	34	

Survey Participants: 129
 Question Respondents: 36
 No Response Count: 0
 Parent Question 'Yes' Respondents: 36
 Parent Question Respondents: 85
 Response Rate: 100%

Figure 37: What could be improved on to attract and retain knowledge workers?	Count	Percent of Question Respondents
Capital	1	1%
Flexible working hours	1	1%
Healthcare	1	1%
Increase networking events	1	1%
Making working Nelson	1	1%
Non-profit recruitment firm	1	1%
Quality of Life	1	1%
Access to the region	2	3%
Consistent employment	3	4%
Better public transportation	4	5%
Promote the region	6	8%
Cost of living	7	9%
Affordable housing	8	11%
Reliable air travel	9	12%
Training and Education	9	12%
Wages	12	16%
Improve telecommunications (broadband)	14	18%
Total	81	

Survey Participants: 97
 Question Respondents: 76

No Response Count: 21
 Response Rate: 78%

Figure 38: Were any of the positions you hired for hard-to-fill?	Count	Percent of Question Respondents
Yes	43	65.15%
No	23	34.85%
Total	66	

Survey Participants: 97
 Question Respondents: 66
 No Response Count: 31
 Response Rate: 68%

Figure 38b: What reasons do you believe made the positions hard to fill?	Count	Percent of Question Respondents
No Applicants At All	1	2%
Inability to Compete With Other Employers Due to Nature of Work (Seasonal/Shift Work/Irregular Hours/Job Content)	2	5%
Inability To Compete With Other Employers Due To Remote Location / Poor Public Transit	3	7%
Inability To Compete With Other Employers Due To Pay and Benefits	9	21%
Applicants Not Meeting Qualification Requirements (Educational Level / Credentials)	13	31%
Applicants Not Meeting Work Experience Requirements	14	33%
Not Enough Applicants	15	36%
Applicants Not Meeting Skills Requirements	18	43%

Applicants Not Meeting Motivation/Attitude/Interpersonal Abilities	19	45%
Total	94	

Survey Participants: 97
 Question Respondents: 42
 No Response Count: 1
 Parent Question 'Yes' Respondents: 43
 Parent Question Respondents: 66
 Response Rate: 98%

Figure 39: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	74	61%
Semi-skilled	17	14%
Entry-level	9	7%
Total	100	

Survey Participants: 129
 Question Respondents: 121
 Response Rate: 93.80%

Figure 39b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	25	20.66%
25 to 49%	12	9.92%
50 to 74%	21	17.36%
75 to 100%	63	52.07%
Total	121	

Survey Participants: 129
 Question Respondents: 121
 No Response Count: 8
 Response Rate: 94%

Figure 39c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	54	56.25%
25 to 49%	14	14.58%
50 to 74%	17	17.71%
75 to 100%	11	11.46%
Total	96	

Survey Participants: 129

Question Respondents: 96
 No Response Count: 33
 Response Rate: 74%

Figure 39d: Percent of workforce: Entry-level	Count	Percent of Question Respondents
less than 25%	58	70.73%
25 to 49%	12	14.63%
50 to 74%	6	7.32%
75 to 100%	6	7.32%
Total	82	

Survey Participants: 129
 Question Respondents: 82
 No Response Count: 47
 Response Rate: 64%

Figure 40: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	62	49.6%
No	63	50.4%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 40b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	87	91%
No	9	9%
Total	96	

Survey Participants: 129
 Question Respondents: 96
 No Response Count: 33
 Response Rate: 74%

Figure 40c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	39	40.21%
No	58	59.79%

Total	97
Survey Participants:	129
Question Respondents:	97
No Response Count:	32
Response Rate:	75%

Figure 41: Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?	Count	Percent of Question Respondents
Yes	81	66%
No	42	34%
Total	123	

Survey Participants:	129
Question Respondents:	123
No Response Count:	6
Response Rate:	95%

Figure 42: Are there any areas of training or professional development that would be of benefit to you or your employees?	Count	Percent of Question Respondents
Yes	97	79.51%
No	25	20.49%
Total	122	

Survey Participants:	129
Question Respondents:	122
No Response Count:	7
Response Rate:	95%

Figure 42b: Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they?	Count	Percent of Question Respondents
Building codes and regulations	1	1%
Career counseling	1	1%
Coaching training	1	1%

Cooking skills	1	1%
Early Childhood Education	1	1%
Electrical Diagnostics	1	1%
Fitness training	1	1%
Graphic Design	1	1%
Group Facilitation	1	1%
Horticulture	1	1%
Hospitality training	1	1%
Industrial equipment operations	1	1%
LEAN initiatives	1	1%
Legal education	1	1%
Metal fabrication	1	1%
Occupational and physio therapists training	1	1%
Product / Business knowledge	1	1%
Project management	1	1%
Time management	1	1%
Training at a Bike Institute	1	1%
Use of retail space and creative displays	1	1%
Workshop - How does a business work	1	1%
Accounting/Bookeeping	2	2%
Conflict resolution	2	2%
Personal growth workshops	2	2%
Managerial training	3	3%
Technical training	3	3%
Communications	4	4%
Social media	4	4%
Emerging industry practices	5	5%
Emerging technologies	5	5%
Web site design	5	5%
Business management	6	6%
Customer service	8	8%
Safety/First Aid/Food Safe	11	11%
Computer skills	12	12%
Sales/Marketing	20	21%

Total	114
Survey Participants:	129
Question Respondents:	97
No Response Count:	0
Parent Question 'Yes' Respondents:	97
Parent Question Respondents:	122
Response Rate:	100%

Figure 43: What new training might you need to consider in the next five years?	Count	Percent of Question Respondents
Building Certification	1	1%
Business management training	1	1%
Equipment operator training	1	1%
Holographic technology	1	1%
Human resources	1	1%
Kombucha Brewing	1	1%
LEAN manufacturing	1	1%
Mediation practice	1	1%
Microbiology	1	1%
Personal training becoming	1	1%
Project Management	1	1%
Social media marketing	1	1%
Water management	1	1%
classroom techniques using new technologies	1	1%
Climate change	2	3%
Product training	2	3%
Professional development	2	3%
Safety	2	3%
Technology Skills	3	4%
Customer service	4	5%
Marketing	4	5%
Social Media	4	5%
Website design	4	5%
Computer and technology training	7	9%

Emerging industry practices	9	12%
Emerging technologies	16	22%
None	2	3%
Total	75	

Survey Participants: 129
 Question Respondents: 74
 No Response Count: 55
 Response Rate: 57%

Figure 44: What modes of education/training work best for you?	Count	Percent of Question Respondents
Individual coaching	57	49%
Classroom	68	58%
Online/ Webinar training	69	59%
Other	32	27%
Total	226	

Survey Participants: 129
 Question Respondents: 117
 No Response Count: 12
 Response Rate: 91%

Figure 44: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Mentor	1	0.85%
Virtual Classroom	1	0.85%
Online/ Webinar training	2	1.71%
Technical training sessions	2	1.71%
Networking	4	3.42%
Trade shows / Conferences	8	6.84%
In-house / Hands on / Workshop	14	11.97%
Total	32	

Survey Participants: 129
 Question Respondents: 31
 No Response Count: 1
 Parent Question 'Other' Respondents: 32
 Parent Question Respondents: 117

Response Rate: 97%

Figure 45: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	16	15%
Rest of Canada	19	17%
Regional	23	21%
British Columbia	41	38%
Local	69	63%
Total	168	

Survey Participants: 129
 Question Respondents: 109
 No Response Count: 20
 Response Rate: 84%

Figure 46: Would you be interested in training to support adopting technology to grow your business?	Count	Percent of Question Respondents
Yes	66	70%
No	28	30%
Total	94	

Survey Participants: 97
 Question Respondents: 94
 No Response Count: 3
 Response Rate: 97%

Figure 46b: If Yes, select all that apply	Count	Percent of Question Respondents
Workshops	38	66.67%
One-on-one support	42	73.68%
Other	16	28.07%
Total	96	

Survey Participants: 97
 Question Respondents: 57
 No Response Count: 40
 Response Rate: 59%

Figure 46c: Would you be interested in training to support adopting	Count	Percent of Question Respondents
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technology to grow your business?: What topics would you be interested in learning more about?		
Active directory	1	1.67%
Adobe Connect	1	1.67%
Asana	1	1.67%
Bookkeeping	1	1.67%
Brewing technologies	1	1.67%
Climate change	1	1.67%
Cloud Storage	1	1.67%
Dealing with custom brokers	1	1.67%
Developing an intranet	1	1.67%
Drupal	1	1.67%
Google Docs	1	1.67%
Information Systems	1	1.67%
Manufacturing resource planning	1	1.67%
Medical terminology course	1	1.67%
Metal fabrication	1	1.67%
Metal work	1	1.67%
Microsoft Office	1	1.67%
Networking	1	1.67%
Photoshop	1	1.67%
Powerpoint	1	1.67%
Presentation Techniques	1	1.67%
Presi	1	1.67%
Processing technology	1	1.67%
Video conferencing	1	1.67%
Work Safe BC requirements/training	1	1.67%
Database management	2	3.33%
Excel	2	3.33%
IT support	2	3.33%
Business Management	3	5.00%
Emerging technologies	3	5.00%
Green technology	3	5.00%
Point of sale systems	3	5.00%
Accounting	4	6.67%
Human resources	4	6.67%

CRM (Customer relationship management)	6	10.00%
Social media	6	10.00%
Web Development	7	11.67%
Marketing	9	15.00%
Total	79	

Survey Participants: 97
 Question Respondents: 60
 No Response Count: 37
 Response Rate: 62%

Union status	Count	Percent of Question Respondents
Yes	6	4.84%
No	67	54.03%
Not applicable	51	41.13%
Total	124	

Survey Participants: 129
 Question Respondents: 124
 No Response Count: 5
 Response Rate: 96%

Figure 47: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Transportation	43	38%
Child care	46	40%
Housing	74	65%
Cost of living	97	85%
Other	41	36%
Total	301	

Survey Participants: 121
 Question Respondents: 114
 No Response Count: 7
 Response Rate: 94%

Figure 47b: Please indicate which issues you believe are critical to your employees?: If Other, please list any other issues	Count	Percent of Question Respondents
Affordable housing	1	0.88%

Benefits	1	0.88%
Broadband service	1	0.88%
Cost of living	1	0.88%
Double income opportunities	1	0.88%
Education	1	0.88%
Lack of amenities	1	0.88%
Quality of work	1	0.88%
Work environment	1	0.88%
Getting enough work hours	2	1.75%
Public transit	2	1.75%
Transportation	2	1.75%
Flextime	3	2.63%
Healthcare	3	2.63%
Lifestyle	9	7.89%
Wages	10	8.77%
Total	40	

Survey Participants: 121
 Question Respondents: 41
 No Response Count: 0
 Parent Question 'Other' Respondents: 41
 Parent Question Respondents: 114
 Response Rate: 100%

Figure 47c: In general terms, what percent of your workforce lives in the: Community (%)	Count	Percent of Question Respondents
0-24%	5	4.20%
25-49%	4	3.36%
50-74%	12	10.08%
75-100%	98	82.35%
Total	119	

Survey Participants: 121
 Question Respondents: 119
 No Response Count: 2
 Response Rate: 98%

Figure 47d: In general terms, what percent of your workforce lives in	Count	Percent of Question Respondents
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the: Region (%) - includes entire Columbia Basin-Boundary region		
0-24%	44	65.67%
25-49%	11	16.42%
50-74%	6	8.96%
75-100%	6	8.96%
Total	67	

Survey Participants: 121
 Question Respondents: 67
 No Response Count: 54
 Response Rate: 55%

Figure 47e: In general terms, what percent of your workforce lives in the: Outside of region (%)	Count	Percent of Question Respondents
0-24%	46	82.14%
25-49%	5	8.93%
50-74%	3	5.36%
75-100%	2	3.57%
Total	56	

Survey Participants: 121
 Question Respondents: 56
 No Response Count: 65
 Response Rate: 46%

SALES

Figure 48: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	5	6%
\$49,999 to \$25,000	6	7%
\$99,999 to \$50,000	11	13%
499,999 to \$100,000	26	31%
\$999,999 to \$500,000	14	17%
\$4.9 million to 1 million	12	14%
\$9.9 million to 5 million	3	4%
\$19.9 million to 10 million	3	4%
\$50 million to 20 million	2	2%

over \$50 million	1	1%
Total	83	

Survey Participants: 129
 Question Respondents: 83
 No Response Count: 46
 Response Rate: 64%

Figure 49: Is the market for your product	Count	Percent of Question Respondents
Stable	44	35%
Decreasing	8	6%
Increasing	74	59%
Total	126	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 50: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents
Stable	41	41%
Decreasing	9	9%
Increasing	51	51%
Total	101	

Survey Participants: 129
 Question Respondents: 101
 No Response Count: 28
 Response Rate: 78%

Figure 51: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	1	1%
0%	13	11%
1 - 9%	46	40%
10 - 24%	37	32%

25 - 49%	12	10%
50 - 99%	4	3%
Over 100%	3	3%
Total	116	

Survey Participants: 129
 Question Respondents: 116
 No Response Count: 13
 Response Rate: 90%

Figure 52: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	8	7%
Staying the same	28	24%
Increasing	81	68%
Not applicable	2	2%
Total	119	

Survey Participants: 129
 Question Respondents: 119
 No Response Count: 10
 Response Rate: 92%

Figure 53: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Staying the same	7	6%
Increasing	7	6%
Not applicable	98	88%
Total	112	

Survey Participants: 129
 Question Respondents: 112
 No Response Count: 17
 Response Rate: 87%

Figure 54: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	11	10%

Staying the same	30	28%
Increasing	66	61%
Not applicable	2	2%
Total	109	

Survey Participants: 129
 Question Respondents: 109
 No Response Count: 20
 Response Rate: 84%

Figure 55: Historical export sales trend	Count	Percent of Question Respondents
Declining	5	4%
Staying the same	4	4%
Increasing	14	12%
Not applicable	91	80%
Total	114	

Survey Participants: 129
 Question Respondents: 114
 No Response Count: 15
 Response Rate: 88%

Figure 56: Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
1 - 9%	28	36%
10 - 25%	16	21%
26 - 50%	8	10%
51 - 75%	8	10%
76 - 100%	17	22%
Total	77	

Survey Participants: 121
 Question Respondents: 77
 No Response Count: 44
 Response Rate: 64%

Figure 57: Source of Majority of Sales	Count	Percent of Question Respondents
Local	77	68%
Provincial	8	7%
National	6	5%
United States	6	5%
International	3	3%
Total	100	

Figure 57b: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents
0%	53	68.83%
1-9%	11	14.29%
10-19%	8	10.39%
50-59%	2	2.60%
70-79%	2	2.60%
90-99%	1	1.30%
Total	77	

Survey Participants: 129
 Question Respondents: 77
 No Response Count: 52
 Response Rate: 60%

Figure 57c: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
0%	42	51.22%
1-9%	15	18.29%
10-19%	11	13.41%
20-29%	5	6.10%
30-39%	1	1.22%
50-59%	2	2.44%
60-69%	2	2.44%
70-79%	2	2.44%
80-89%	1	1.22%

90-99%	1	1.22%
Total	82	

Survey Participants: 129
 Question Respondents: 82
 No Response Count: 47
 Response Rate: 64%

Figure 57d: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
0%	33	36.67%
1-9%	15	16.67%
10-19%	17	18.89%
20-29%	11	12.22%
30-39%	5	5.56%
40-49%	2	2.22%
50-59%	1	1.11%
60-69%	2	2.22%
70-79%	1	1.11%
80-89%	3	3.33%
Total	90	

Survey Participants: 129
 Question Respondents: 90
 No Response Count: 39
 Response Rate: 70%

Figure 57e: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
0%	27	28.42%
1-9%	17	17.89%
10-19%	19	20.00%
20-29%	15	15.79%
30-39%	4	4.21%
40-49%	2	2.11%
50-59%	4	4.21%
60-69%	1	1.05%
70-79%	4	4.21%
90-99%	2	2.11%

Total	95
Survey Participants:	129
Question Respondents:	95
No Response Count:	34
Response Rate:	74%

Figure 57f: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
0%	6	5.26%
1-9%	5	4.39%
10-19%	6	5.26%
20-29%	10	8.77%
30-39%	1	0.88%
40-49%	3	2.63%
50-59%	6	5.26%
60-69%	5	4.39%
70-79%	9	7.89%
80-89%	10	8.77%
90-99%	21	18.42%
100%	32	28.07%
Total	114	

Survey Participants:	129
Question Respondents:	114
No Response Count:	15
Response Rate:	88%

Figure 57g: Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	68	70%
No	29	30%
Total	97	

Survey Participants:	129
Question Respondents:	97
No Response Count:	32
Response Rate:	75%

Figure 58: International trade status	Count	Percent of Question Respondents
Export	17	13%
Import	21	17%
None	4	3%
Not applicable	89	71%
Total	131	

Survey Participants: 129
 Question Respondents: 126
 No Response Count: 3
 Response Rate: 98%

Figure 59: Do you engage in government procurement?	Count	Percent of Question Respondents
Yes	35	29%
No	84	71%
Total	119	

Survey Participants: 121
 Question Respondents: 119
 No Response Count: 2
 Response Rate: 98%

Figure 60: Source of Majority of Supplies	Count	Percent of Question Respondents
Local	40	40%
Provincial	20	20%
National	16	16%
United States	9	9%
International	8	8%
Total	93	

Figure 60b: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
0%	15	15.00%
1-9%	14	14.00%
10-19%	14	14.00%
20-29%	6	6.00%
30-39%	2	2.00%
40-49%	2	2.00%
50-59%	7	7.00%
60-69%	2	2.00%
70-79%	6	6.00%
80-89%	6	6.00%
90-99%	14	14.00%
100%	12	12.00%
Total	100	

Survey Participants: 129
 Question Respondents: 100
 No Response Count: 29
 Response Rate: 78%

Figure 60c: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
0%	24	27.59%
1-9%	8	9.20%
10-19%	13	14.94%
20-29%	11	12.64%
30-39%	4	4.60%
40-49%	3	3.45%
50-59%	4	4.60%
60-69%	4	4.60%
70-79%	3	3.45%
80-89%	3	3.45%
90-99%	4	4.60%
100%	6	6.90%
Total	87	

Survey Participants: 129
 Question Respondents: 87

No Response Count: 42
 Response Rate: 67%

Figure 60d: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
0%	23	27.38%
1-9%	12	14.29%
10-19%	10	11.90%
20-29%	7	8.33%
30-39%	5	5.95%
40-49%	2	2.38%
50-59%	9	10.71%
60-69%	1	1.19%
70-79%	3	3.57%
80-89%	3	3.57%
90-99%	5	5.95%
100%	4	4.76%
Total	84	

Survey Participants: 129
 Question Respondents: 84
 No Response Count: 45
 Response Rate: 65%

Figure 60e: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
0%	31	37.35%
1-9%	15	18.07%
10-19%	10	12.05%
20-29%	6	7.23%
30-39%	3	3.61%
40-49%	2	2.41%
50-59%	7	8.43%
70-79%	2	2.41%
80-89%	4	4.82%
90-99%	1	1.20%
100%	2	2.41%
Total	83	

Survey Participants: 129
 Question Respondents: 83
 No Response Count: 46
 Response Rate: 64%

Figure 60f: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
0%	47	70.15%
1-9%	3	4.48%
10-19%	3	4.48%
20-29%	2	2.99%
30-39%	1	1.49%
40-49%	1	1.49%
50-59%	2	2.99%
60-69%	1	1.49%
70-79%	2	2.99%
90-99%	3	4.48%
100%	2	2.99%
Total	67	

Survey Participants: 129
 Question Respondents: 67
 No Response Count: 62
 Response Rate: 52%

Figure 61: What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?	Count	Percent of Question Respondents
Alarm testing	1	1.20%
Aluminum pipe	1	1.20%
Art supplies	1	1.20%
Bag tags	1	1.20%
Baking supplies	1	1.20%
Books	1	1.20%
Children's equipment	1	1.20%
Chocolate	1	1.20%
Coffee	1	1.20%
Copper	1	1.20%
Educational material	1	1.20%

Electronics	1	1.20%
Engineering services	1	1.20%
Film	1	1.20%
Garments for printing	1	1.20%
Graphic design services	1	1.20%
Heavy equipment/parts	1	1.20%
Herbs	1	1.20%
Hops	1	1.20%
Insurance	1	1.20%
Liquor	1	1.20%
Lumber ink	1	1.20%
Malted grain	1	1.20%
Marketing expertise	1	1.20%
Medical supplies	1	1.20%
Occupational therapy equipment	1	1.20%
Organic flour	1	1.20%
Paper	1	1.20%
Printing services	1	1.20%
Recreational Equipment	1	1.20%
Recreational equipment	1	1.20%
Refrigeration	1	1.20%
Repair services	1	1.20%
Robots (Drones)	1	1.20%
Shipping Services	1	1.20%
Steel	1	1.20%
Tarp wrap	1	1.20%
Travel service	1	1.20%
Wholesale services	1	1.20%
Windows and doors	1	1.20%
Childrens Toys	2	2.41%
Furniture	2	2.41%
Packaging services	2	2.41%
Web hosting service	2	2.41%
All of our products and services	3	3.61%
Office furniture	3	3.61%
Office supplies	4	4.82%
Meats & Dairy / Fruits and Vegetables / Grains	7	8.43%
Computers / Software	10	12.05%
None	17	20.48%
Total	92	

Survey Participants: 121
 Question Respondents: 83
 No Response Count: 38
 Response Rate: 69%

Figure 61b: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?	Count	Percent of Question Respondents
Long term contract with outside supplier	1	1%
No control	3	3%
head office decision	3	3%
Loyalty to current supplier	5	5%
Quality of available products	7	7%
Unaware of local vendors	9	9%
No applicable to this business	14	15%
Higher costs locally	41	43%
Product not available here	65	68%
Other	13	14%
Total	161	

Survey Participants: 121
 Question Respondents: 95
 No Response Count: 26
 Response Rate: 79%

Figure 61c: If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If <i>Other</i>, specify	Count	Percent of Question Respondents
Liquor Control Board regulations	1	1.05%
Only small amount of product needed	1	1.05%

Specialized product	1	1.05%
Supply shortage	1	1.05%
Not available here	7	7.37%
Total	11	

Survey Participants: 121
 Question Respondents: 13
 No Response Count: 0
 Parent Question 'Other' Respondents: 13
 Parent Question Respondents: 95
 Response Rate: 100%

FACILITIES AND EQUIPMENT

Figure 62: What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents
less than 1,000 sq ft	55	45%
1,000-4,999 sq ft	38	31%
5,000-9,999 sq ft	15	12%
10,000-19,999 sq ft	5	4%
20,000 sq ft or more	9	7%
Total	122	

Survey Participants: 129
 Question Respondents: 122
 No Response Count: 7
 Response Rate: 95%

Figure 63:Condition of facility	Count	Percent of Question Respondents
Excellent	44	35%
Good	55	44%
Fair	19	15%
Poor	6	5%
Total	124	

Survey Participants: 129

Question Respondents: 124
 No Response Count: 5
 Response Rate: 96%

Figure 64: Condition of equipment	Count	Percent of Question Respondents
Excellent	44	35%
Good	62	50%
Fair	16	13%
Poor	3	2%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 65: Status of facility	Count	Percent of Question Respondents
Leased	62	49%
Owned	65	51%
Total	127	

Survey Participants: 129
 Question Respondents: 127
 No Response Count: 2
 Response Rate: 98%

Figure 66: Status of facility: If Leased, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	17	52%
1-2 Years	7	21%
3-5 Years	4	12%
>5 Years	5	15%
Total	33	

Survey Participants: 129
 Question Respondents: 33
 No Response Count: 29
 Parent Question 'Leased' Respondents: 62
 Parent Question Respondents: 127
 Response Rate: 53%

Figure 66b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	48	81.36%
No	11	18.64%
Total	59	

Survey Participants: 129
 Question Respondents: 59
 No Response Count: 3
 Parent Question 'Leased' Respondents: 62
 Parent Question Respondents: 127

Figure 66c: Are you planning on renewing current lease?: If No, why not	Count	Percent of Question Respondents
Unknown	1	9.09%
Business expanding	2	18.18%
High cost	2	18.18%
Moving to new location	3	27.27%
Purchasing a facility	3	27.27%
Total	11	

Survey Participants: 129
 Question Respondents: 11
 No Response Count: 0
 Parent Question 'No' Respondents: 11

Parent Question Respondents: 59
 Response Rate: 100%

Figure 67: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	18	20%
Own	70	80%
Total	88	

Survey Participants: 129
 Question Respondents: 88
 No Response Count: 41
 Response Rate: 68%

Figure 68: Historical investment trends: Over past 18 months in the <i>facility</i>	Count	Percent of Question Respondents
Declining	3	3%
Staying the same	72	61%
Increasing	44	37%
Total	119	

Survey Participants: 129
 Question Respondents: 119
 No Response Count: 10
 Response Rate: 92%

Figure 69: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	63	50%
No	56	44%
Maybe	7	6%
Total	126	

Survey Participants: 129
 Question Respondents: 126

No Response Count: 3
 Response Rate: 98%

Figure 70: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	64	51%
No	61	49%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 70b: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	50	44.25%
No	63	55.75%
Total	113	

Survey Participants: 129
 Question Respondents: 113
 No Response Count: 16
 Response Rate: 88%

Figure 71: Does the company plan to expand in the next three years?: Is your current site adequate for the proposed expansion?	Count	Percent of Question Respondents
Yes	36	63%
No	21	37%
Total	57	

Survey Participants: 129
 Question Respondents: 57
 No Response Count: 7

Parent Question 'Yes' Respondents: 64
 Parent Question Respondents: 125
 Response Rate: 89%

Figure 72: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents
Yes	54	87%
No	8	13%
Total	62	

Survey Participants: 129
 Question Respondents: 62
 No Response Count: 2
 Parent Question 'Yes' Respondents: 64
 Parent Question Respondents: 125
 Response Rate: 97%

Figure 73: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	9	23%
\$25,000-\$99,999	6	15%
\$100,000-\$499,999	8	21%
\$500,000-\$999,999	4	10%
\$1-\$4.9 million	9	23%
\$5-\$9.9 million	1	3%
\$10-19.9 million	2	5%
Total	39	

Survey Participants: 129
 Question Respondents: 39
 No Response Count: 25
 Parent Question 'Yes' Respondents: 64

Parent Question Respondents: 125
 Response Rate: 61%

Figure 74: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
0%	6	16%
Under 50%	12	32%
50 to 99%	6	16%
100%	14	37%
Total	38	

Survey Participants: 129
 Question Respondents: 38
 No Response Count: 26
 Parent Question 'Yes' Respondents: 64
 Parent Question Respondents: 125
 Response Rate: 59%

Figure 75: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents
0%	13	35%
Under 50%	6	16%
50 to 99%	10	27%
100%	8	22%
Total	37	

Survey Participants: 129
 Question Respondents: 37
 No Response Count: 27
 Parent Question 'Yes' Respondents: 64
 Parent Question Respondents: 125
 Response Rate: 58%

Figure 76: Does the company plan to expand in the next three years?: Estimated facility size increase (square feet)	Count	Percent of Question Respondents
Less than 1,000 sq ft	19	49%
1,000 to 4,999 sq ft	14	36%
5,000-9,999 sq ft	1	3%
10,000-19,999 sq ft	4	10%
20,000 sq ft or more	1	3%
Total	39	

Survey Participants: 129
 Question Respondents: 39
 No Response Count: 25
 Parent Question 'Yes' Respondents: 64
 Parent Question Respondents: 125
 Response Rate: 61%

Figure 77: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	66	67%
No	33	33%
Total	99	

Survey Participants: 129
 Question Respondents: 99
 No Response Count: 30
 Response Rate: 77%

Figure 77b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	14	21.54%
6	7	10.77%
12	20	30.77%

18	7	10.77%
24	8	12.31%
36	9	13.85%
Total	65	

Survey Participants: 129
 Question Respondents: 65
 No Response Count: 1
 Parent Question 'Yes' Respondents: 66
 Parent Question Respondents: 99
 Response Rate: 98%

Figure 78: Planning any upgrades to the facility?	Count	Percent of Question Respondents
Yes	51	54%
No	44	46%
Total	95	

Survey Participants: 129
 Question Respondents: 95
 No Response Count: 34
 Response Rate: 74%

Figure 78b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	19	38.78%
6	13	26.53%
12	10	20.41%
18	4	8.16%
24	3	6.12%
Total	49	

Survey Participants: 129
 Question Respondents: 49
 No Response Count: 2

Parent Question 'Yes' Respondents: 51
 Parent Question Respondents: 95
 Response Rate: 96%

Figure 79: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Building is for sale	1	5%
Cost	1	5%
Lack of suitable premises	1	5%
Lease issues	1	5%
Poor access to site	1	5%
Selling business	1	5%
Affordable commercial space	2	9%
City development restrictions	2	9%
Infrastructure limitations	2	9%
Owership	2	9%
Financing	7	32%
None	3	14%
Total	24	

Survey Participants: 129
 Question Respondents: 22
 No Response Count: 22
 Parent Question 'No' Respondents: 44
 Parent Question Respondents: 95
 Response Rate: 50%

Figure 80: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Energy costs	2	3%

Energy reliability	2	3%
Roads	5	8%
Transport/freight	5	8%
Warehousing	5	8%
Broadband access	6	9%
Identifying and accessing new markets	7	11%
Problems with DAs	8	12%
Lack of skilled staff	10	15%
Local regulations e.g. zoning	11	17%
Other (please specify):	13	20%
Lack of suitable premises	17	26%
Finance	25	38%
Total	116	

Survey Participants: 129
Question Respondents: 65
No Response Count: 0
Parent Question 'Yes' Respondents: 64
Parent Question Respondents: 125
Response Rate: 100%

Figure 80b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
Childcare	1	5.00%
Demand for service / product	1	5.00%
Expansion costs	1	5.00%
Government	1	5.00%
Identifying / Accessing New Markets	1	5.00%
Landlord Issues	1	5.00%
Local Regulations	1	5.00%

Resources	1	5.00%
Skilled labour supply	1	5.00%
Snow	1	5.00%
Staffing	1	5.00%
Time	1	5.00%
Lack of Suitable Premises	5	25.00%
Total	17	

Survey Participants: 129
 Question Respondents: 20
 No Response Count: 0
 Parent Question 'Other (please specify):' Respondents: 20
 Parent Question Respondents: 65
 Response Rate: 100%

Figure 81: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	23	26.74%
No	63	73.26%
Total	86	

Survey Participants: 129
 Question Respondents: 86
 No Response Count: 43
 Response Rate: 67%

Figure 81b: If Yes, which have you approached?	Count	Percent of Question Respondents
BC Ministry responsible for Economic Development	2	9%
Chamber of	3	14%

Commerce		
Local Economic Development Office	3	14%
BC Hydro	4	18%
Community Futures	5	23%
Local Council	5	23%
Other (please specify):	13	59%
Total	35	

Survey Participants: 129
 Question Respondents: 22
 No Response Count: 1
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 86
 Response Rate: 96%

Figure 81c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
Aboriginal Education Organizations.	1	4.55%
Aboriginal Relationships	1	4.55%
BC Housing	1	4.55%
Basin Business Advisor	1	4.55%
Board of Directors	1	4.55%
Canadian Heritage	1	4.55%
Export Development Corporation	1	4.55%
Forest Product Innovations	1	4.55%
IRAP	1	4.55%
KAST	1	4.55%
Ministry of Jobs	1	4.55%
Ministry of Advanced Education	1	4.55%
Ministry of Transportation	1	4.55%

Personal business coach	1	4.55%
RDCK (Regional District of Central Kootenay)	1	4.55%
Royal and Scotia Banks	1	4.55%
Skills Training	1	4.55%
Tourism	1	4.55%
VanCity	1	4.55%
Banks	2	9.09%
CBT	3	13.64%
Total	24	

Survey Participants: 129
 Question Respondents: 13
 No Response Count: 0
 Parent Question 'Other' Respondents: 13
 Parent Question Respondents: 22
 Response Rate: 100%

Figure 82: Would you be interested in operating out of a co-working space with other workers?	Count	Percent of Question Respondents
Yes	25	28%
No	65	72%
Total	90	

Survey Participants: 97
 Question Respondents: 90
 No Response Count: 7
 Response Rate: 93%

Figure 83: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	64	56%
No	50	44%
Total	114	

Survey Participants: 121
 Question Respondents: 114
 No Response Count: 7
 Response Rate: 94%

Figure 84: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	67	54%
No	57	46%
Total	124	

Survey Participants: 129
 Question Respondents: 124
 No Response Count: 5
 Response Rate: 96%

GOVERNMENT SERVICES

Figure 85: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	78	84%	6	6%	3	3%	5	5%	1	1%	93
Access to US Border	24	24%	4	4%	6	6%	60	59%	7	7%	101
Access to airport facilities	4	3%	51	43%	38	32%	21	18%	5	4%	119
Access to highway/ roads	2	2%	5	4%	23	20%	69	60%	16	14%	115
Access to markets	9	8%	14	12%	19	17%	52	46%	19	17%	113
Access to suppliers	6	5%	13	12%	35	31%	48	42%	11	10%	113
Availability of appropriately zoned land	43	45%	20	21%	13	14%	16	17%	3	3%	95
Availability of buildings for lease or purchase	33	31%	26	24%	25	23%	21	19%	3	3%	108
Availability of rail transport	75	80%	13	14%	3	3%	2	2%	1	1%	94
Availability of road transport services	5	4%	9	8%	30	25%	53	45%	22	18%	119
Availability of warehousing	62	63%	17	17%	11	11%	6	6%	3	3%	99
Development approval process	46	48%	12	13%	18	19%	18	19%	1	1%	95
Disposal of waste material	18	17%	26	25%	17	16%	38	36%	6	6%	105
Inspections /licensing	26	26%	11	11%	13	13%	41	41%	9	9%	100
Recycling	9	9%	19	18%	16	15%	48	46%	13	12%	105
Telecommunications (internet, cell)	3	3%	11	10%	37	32%	48	42%	16	14%	115
Water and sewerage supply	20	19%	9	9%	9	9%	53	51%	13	13%	104
Survey Participants:	129										

Figure 85b: Please rate the following: Other (please specify)	Please rate the following: Other (please specify)	Count	Percent of Question Respondents
Availability of Parking	Poor	2	16.67%
Court services	Fair	1	8.33%
Liquor control Board	Poor	1	8.33%
Service BC	Good	1	8.33%
Support for outreach	Poor	1	8.33%
Total		6	50.00%

Survey Participants: 129
 Question Respondents: 12
 No Response Count: 117
 Response Rate: 9%

86: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	85	72.65%
No	32	27.35%
Total	117	

Survey Participants: 129
 Question Respondents: 117
 No Response Count: 12
 Response Rate: 91%

Figure 86b: Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If Yes, how?	Count	Percent of Question Respondents
Access to information	1	1.18%
Education services	1	1.18%
Health services	1	1.18%
Improve community collaboration between police and social services	1	1.18%
Improve game licensing	1	1.18%
Improve rest areas on highways	1	1.18%
Improve sewage and waste water management	1	1.18%
Increase educational services	1	1.18%

Provide prompt service	1	1.18%
Reduce Workers Compensation Board (WCB) regulations	1	1.18%
Snow removal	1	1.18%
Address land zoning issues	2	2.35%
Assist the development process	2	2.35%
Improve Border services	2	2.35%
Improve highway and road quality and service	2	2.35%
Increase public transportation	2	2.35%
Restructure taxes	2	2.35%
Streamline development approval processes	2	2.35%
Improve recycling and waste management	3	3.53%
Improve shipping and receiving	3	3.53%
Streamline granting of permits	3	3.53%
Provide a cost effective shipping and receiving service	5	5.88%
Review land use and zoning	5	5.88%
Improve Waste Management / Recycling	9	10.59%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	19	22.35%
Improve Airport service	25	29.41%
Total	97	

Survey Participants: 129

Question Respondents: 85

No Response Count: 0

Parent Question 'Yes' Respondents: 85

Parent Question Respondents: 117

Figure 87: Which airport services do you use?	Count	Percent of Question Respondents
Kamloops	1	1%
Nelson	1	1%
Calgary	2	2%
Vancouver	2	2%
Cranbrook	10	11%
Kelowna	13	14%

Trail	16	17%
Spokane	19	20%
Castlegar	58	61%
None	13	14%
Total	135	

Survey Participants: 129
 Question Respondents: 95
 No Response Count: 34
 Response Rate: 74%

Figure 88: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Commuter flights	1	1%
Fewer cancellations	1	1%
Larger aircraft	1	1%
More destinations	1	1%
Tourism services	1	1%
Washrooms in departure	1	1%
More airlines	3	4%
Shuttle service	3	4%
More flights	13	17%
Better flight reliability	27	35%
Improvements to navigational aids	31	40%
Total	83	

Survey Participants: 129
 Question Respondents: 77
 No Response Count: 52
 Response Rate: 60%

BUSINESS CLIMATE

Figure 89: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	15	12%
Good	68	55%
Fair	35	28%
Poor	5	4%
Total	123	

Survey Participants:	129
Question Respondents:	123
No Response Count:	6
Response Rate:	95%

Figure 90: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
BIA	41	48%	8	9%	12	14%	24	28%	1	1%	86
Chamber of Commerce	19	19%	7	7%	13	13%	37	37%	23	23%	99
Colleges/Universities	7	6%	10	8%	25	20%	68	54%	15	12%	125
Community Futures	23	24%	2	2%	6	6%	41	43%	23	24%	95
Cultural/Recreational Amenities	1	1%	3	2%	9	7%	64	50%	50	39%	127
Economic Development	10	8%	16	13%	35	29%	52	43%	8	7%	121
Housing	1	1%	40	32%	53	42%	30	24%	1	1%	125
K-12 education	17	14%	8	6%	20	16%	59	47%	21	17%	125
Local Government	13	10%	18	14%	30	24%	53	42%	11	9%	125
Local Tax Structure	27	23%	22	18%	34	28%	32	27%	5	4%	120
Technical Training	25	20%	19	15%	27	22%	41	33%	12	10%	124
Tourism services	9	9%	5	5%	11	11%	51	52%	23	23%	99
Workforce Availability	7	6%	24	19%	39	31%	39	31%	16	13%	125
Workforce Quality	5	4%	17	14%	26	21%	56	45%	21	17%	125
Workforce Stability	7	6%	19	15%	45	36%	37	30%	17	14%	125

Survey Participants: 129

Figure 91: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	63	50%
No change	31	25%
Worse today	20	16%
No opinion	11	9%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 91b: Please compare the local business climate today versus 5 years ago: If worse today, why?	Count	Percent of Question Respondents
Cross border shopping	1	5.26%
Declining employment	1	5.26%
Declining market	1	5.26%
Fewer children	1	5.26%
Locals shopping elsewhere	1	5.26%
More competition	1	5.26%
Poor Government Relations	1	5.26%
Strong Canadian dollar	1	5.26%
Weak Canadian dollar	1	5.26%
Legalization of marijuana across the border	2	10.53%
Online shopping	3	15.79%
Declining economy	6	31.58%
Total	20	

Survey Participants: 129
 Question Respondents: 19
 No Response Count: 1
 Parent Question 'Worse today' Respondents: 20

Figure 92: Do you have any forecast for the condition of the local business climate 5 years from today?	Count	Percent of Question Respondents
Will be better	76	65%
No change	16	14%
Will be worse	9	8%
No opinion	16	14%
Total	117	

Survey Participants: 129

Question Respondents: 117

No Response Count: 12

Response Rate: 91%

Figure 93: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Affluent residents	1	1%
Amenities	1	1%
Canadian regulations	1	1%
Chamber of Commerce	1	1%
Creative community	1	1%
Fusion and cooperative models	1	1%
Growth potential	1	1%
Low competition	1	1%
Natural attractions	1	1%
Progressive	1	1%
Stable economy	1	1%
Creative business owners	2	2%
Friendliness	2	2%
Outdoor activities	2	2%
Word of mouth	2	2%
Collaboration among businesses	3	2%
Environment	3	2%
Social network	3	2%
Unique shops	3	2%
Vibrant downtown	4	3%
Great place to live	5	4%
Shop local awareness	6	5%

Skilled workforce	6	5%
Tourism	6	5%
Recreational opportunities	7	6%
Customer loyalty	9	7%
Natural beauty	9	7%
Location	10	8%
Community commitment to local businesses	13	10%
Great community	17	13%
Lifestyle	23	18%
Total	146	

Survey Participants: 129

Question Respondents: 127

No Response Count: 2

Response Rate: 98%

Figure 94: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Access to skilled labour	1	1%
Available space	1	1%
Competition	1	1%
Development approval process	1	1%
Downtown parking	1	1%
Lack of innovative recruitment	1	1%
Lack of motivation	1	1%
Lack of skilled workforce	1	1%
Location	1	1%
Low pay scale	1	1%
Planning and development process	1	1%
Poor road conditions	1	1%
Reliance on tourism	1	1%
Risk aversion	1	1%
Tax structure	1	1%
Access to local knowledge	2	2%
Aging infrastructure	2	2%

Lack of local services	2	2%
Lack of support for local businesses	2	2%
Low average income	2	2%
Poor customer service	2	2%
Reliable transportation	3	2%
Suitable staff	3	2%
Economic climate	4	3%
High business taxes	4	3%
Kootenay time or laissez fair attitude	4	3%
Limited market	4	3%
Internet access	6	5%
Population (size/growth/aging)	7	5%
Shipping and Receiving costs	7	5%
Development Constraints (Zoning/Bureaucracy/Permits)	8	6%
High cost of living	8	6%
Airport limitations	10	8%
Geographic isolation	28	22%
Total	123	

Survey Participants: 129
 Question Respondents: 128
 No Response Count: 1
 Response Rate: 99%

Figure 95: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	106	84.80%
No	19	15.20%
Total	125	

Survey Participants: 129
 Question Respondents: 125
 No Response Count: 4
 Response Rate: 97%

Figure 95: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Access to capital	1	1%
Availability of housing	1	1%
Community lacks imagination	1	1%
Competition	1	1%
Economic Business Climate	1	1%
Infrastructure supporting local economy	1	1%
Job market is small	1	1%
Lack of entrepreneurial skill	1	1%
Low income levels	1	1%
Lack of a anchor industry	2	2%
Limited market	2	2%
Tax structure	2	2%
Affordable housing	3	3%
Internet access	3	3%
Shipping costs	3	3%
Cost of doing business	4	4%
Cost of living	4	4%
Low economic diversification	4	4%
Skilled labour	4	4%
Population (size / growth / age)	5	5%
Airport service	6	6%
Developmental approval process	6	6%
Resistance to change	7	7%
Availability of land	8	8%
Isolated location	14	13%
Geographic constraints	26	25%
Total	112	

Survey Participants: 129

Question Respondents: 105

No Response Count: 1

Parent Question 'Yes' Respondents:	106
Parent Question Respondents:	125
Response Rate:	99%

Figure 96: Level of service from business support providers	Not Applicable	% Not Applicable	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Basin Business Advisors	55	70%	3	4%	2	3%	2	3%	10	13%	7	9%	79
Chamber of Commerce	21	24%	2	2%	8	9%	6	7%	27	31%	23	26%	87
College Industry Liaison Officer	56	78%	1	1%	2	3%	3	4%	6	8%	4	6%	72
Community Futures	29	34%	5	6%	2	2%	4	5%	24	28%	22	26%	86
Continuing Education and Workforce Training	40	48%	1	1%	2	2%	6	7%	28	33%	7	8%	84
Economic Development Organization / Commission	47	62%	3	4%	2	3%	2	3%	13	17%	9	12%	76
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	52	64%	4	5%	1	1%	3	4%	15	19%	6	7%	81
Invest Kootenay	61	85%	1	1%	2	3%	3	4%	5	7%	0	0%	72
Kootenay Aboriginal Business Advocates Society	71	97%	0	0%	1	1%	1	1%	0	0%	0	0%	73
National Research Council Industrial Research Assistance	60	79%	3	4%	1	1%	1	1%	7	9%	4	5%	76
Scientific Research and Experimental Development Tax Incentive Program	62	84%	1	1%	4	5%	0	0%	5	7%	2	3%	74

Survey Participants: 121

Figure 97: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	49	42.61%
No	66	57.39%
Total	115	

Survey Participants: 129
 Question Respondents: 115
 No Response Count: 14
 Response Rate: 89%

Figure 97b Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Forestry Suppliers	1	3%
Green industries	1	3%
Hazmat	1	3%
New Entry	1	3%
Telecommunications Providers	1	3%
Vaping products	1	3%
Wholesalers	1	3%
Distributors	2	6%
Meats & Dairy / Fruits and Vegetables / Grains	2	6%
Farmers	4	12%
Manufacturers	5	15%
Technology companies	7	21%
Total	27	

Survey Participants: 129
 Question Respondents: 34
 No Response Count: 15
 Parent Question 'Yes' Respondents: 49
 Parent Question Respondents: 115
 Response Rate: 69%

Figure 98: Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Bridal industry	1	1%
Commercial vehicle maintenance	1	1%
Government Services	1	1%
Hospitality	1	1%
Housing co-ops	1	1%
Internet services	1	1%
Shipping companies	1	1%
Transportation	1	1%
Vaping industry	1	1%
Video production industry	1	1%
Airport services	2	2%
Creative businesses	2	2%
Health and Wellness	3	3%
Information Technology	3	3%
Recreational services	3	3%
Food businesses	5	5%
Green Businesses	5	5%
Educational services	6	6%
Construction	7	7%
Manufacturing	7	7%
Technology businesses	12	12%
Tourism	25	24%
Total	90	

Survey Participants: 129
 Question Respondents: 103
 No Response Count: 26
 Response Rate: 80%

Figure 99: Business competitiveness factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important	Respondents
Access to exporting and international markets	51	44%	30	26%	36	31%	117
Accessing capital	13	11%	38	32%	66	56%	117
Add or change in business, products or services	6	5%	26	23%	83	72%	115
Affordable shipping/freight	20	17%	23	19%	75	64%	118
Availability of telecommunications infrastructure and services	4	3%	13	11%	102	86%	119
Energy costs	15	13%	32	27%	70	60%	117
Exchange rate for Canadian dollar	9	8%	31	26%	79	66%	119
Expansion of workforce employees	8	7%	34	29%	76	64%	118
Improvement business management	2	2%	17	15%	94	83%	113
Improvement of customer services	8	7%	9	8%	100	85%	117
Improving worker productivity	12	10%	20	17%	85	73%	117

New market development locally	5	4%	19	16%	93	79%	117
New market development outside of region	10	8%	26	22%	82	69%	118
New product research and development	11	9%	17	14%	91	76%	119
Reliable air transportation	24	20%	30	25%	65	55%	119
Strategic alliances (joining with other businesses to provide products/services)	7	6%	16	14%	94	80%	117
Water/sewer availability	35	30%	22	19%	60	51%	117
Water/sewer costs	37	32%	30	26%	49	42%	116
Workforce skill development	4	3%	11	9%	103	87%	118
Workplace health and safety	16	14%	23	20%	76	66%	115

Survey Participants: 121

Figure 89: Importance of Business Competitiveness Factors

Importance of Business Competitiveness Factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important
Access to exporting and international markets	19	43%	14	32%	11	25%
Accessing capital	11	25%	12	27%	21	48%
Add or change in business, products or services	8	18%	8	18%	28	64%
Affordable shipping/freight	12	27%	6	14%	26	59%
Availability of telecommunications infrastructure and services	5	11%	3	7%	36	82%
Energy costs	8	18%	12	27%	24	55%
Exchange rate for Canadian dollar	10	23%	11	25%	23	52%
Expansion of workforce employees	6	14%	11	25%	27	61%
Improvement business management	9	20%	5	11%	30	68%
Improvement of customer services	8	18%	1	2%	35	80%

Improving worker productivity	7	16%	7	16%	30	68%
New market development locally	7	16%	9	20%	28	64%
New market development outside of region	8	18%	16	36%	20	45%
New product research and development	9	20%	8	18%	27	61%
Reliable air transportation	13	30%	19	43%	12	27%
Strategic alliances (joining with other businesses to provide products/services)	9	20%	12	27%	23	52%
Water/sewer availability	8	18%	14	32%	22	50%
Water/sewer costs	9	20%	15	34%	20	45%
Workforce skill development	6	14%	4	9%	34	77%
Workplace health and safety	7	16%	8	18%	29	66%

Survey Respondents: 44

Figure 100: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	7	6%	2	2%	23	20%	37	32%	46	40%	115
Investing in people and skills	8	7%	0	0%	13	11%	49	43%	45	39%	115
Leadership and management capacity	2	2%	2	2%	8	7%	61	53%	42	37%	115
Measuring impact of productivity efforts/ investments	4	4%	10	9%	25	23%	45	41%	26	24%	110
Networking and collaboration with other businesses	4	4%	4	4%	22	20%	46	41%	36	32%	112
Organizing work (structures & processes)	2	2%	0	0%	11	10%	52	46%	47	42%	112
Productive workplace culture	3	3%	0	0%	10	9%	55	48%	47	41%	115

Survey Participants: 121

Figure 101: Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3)	Count	Percent of Question Respondents
Government	4	3%
Construction	11	9%
Forestry	11	9%
Agriculture	15	13%
Manufacturing	16	14%
Other niche service businesses (e.g. services to seniors)	19	16%
Health & wellness	30	25%
Education	31	26%
Arts	32	27%
culture and creative businesses	32	27%
Green or environmental businesses	36	31%
Relocation of people from urban centres	37	31%
Technology-based businesses	49	42%
Tourism	75	64%
Other	28	24%
Total	426	

Survey Participants: 121
 Question Respondents: 118
 No Response Count: 3
 Response Rate: 98%

Figure 101b: Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3): If <i>Other</i> please specify	Count	Percent of Question Respondents
Agriculture	1	1%

Hi-Tech	1	1%
Niche Businesses	1	1%
Recreation	1	1%
Senior Services	1	1%
Sports and recreation	1	1%
Social entrepreneurship	2	2%
Total	8	

Survey Participants: 121
 Question Respondents: 9
 No Response Count: 19
 Parent Question 'Other' Respondents: 28
 Parent Question Respondents: 118
 Response Rate: 32%

Figure 102: Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
Yes	42	42.42%
No	57	57.58%
Total	99	

Survey Participants: 121
 Question Respondents: 99
 No Response Count: 22
 Response Rate: 82%

Figure 102b: Is your business impacted by its proximity to the Alberta border?: If Yes, please explain	Count	Percent of Question Respondents
Negative - Workforce migration to Alberta	1	3%
Positive - Alberta suppliers	1	3%
Positive - Alberta workforce	1	3%
Negative - Alberta has lower taxes	2	5%
Negative - Alberta competition	4	10%

Positive - Alberta tourists	7	18%
Positive - Alberta customers	23	59%
Total	39	

Survey Participants: 121
 Question Respondents: 39
 No Response Count: 3
 Parent Question 'Yes' Respondents: 42
 Parent Question Respondents: 99
 Response Rate: 93%

Figure 103: How important to your business success is access to reliable internet?	Count	Percent of Question Respondents
1 - least important	2	2%
2	1	1%
3	6	7%
4	14	15%
5 - most important	69	75%
Total	92	

Survey Participants: 97
 Question Respondents: 92
 No Response Count: 5
 Response Rate: 95%

ASSESSMENT AND PLANS

Figure 104: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	31	25%
Good	73	59%
Fair	16	13%
Poor	4	3%
Total	124	

Survey Participants: 129

Question Respondents: 124
 No Response Count: 5
 Response Rate: 96%

Figure 105: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	3	2%
Good	13	11%
Fair	1	1%
Not applicable	105	86%
Total	122	

Survey Participants: 129
 Question Respondents: 122
 No Response Count: 7
 Response Rate: 95%

Figure 106: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	69	56%
Good	47	38%
Fair	4	3%
Poor	1	1%
Not applicable	2	2%
Total	123	

Survey Participants: 129
 Question Respondents: 123
 No Response Count: 6
 Response Rate: 95%

Figure 107: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	8	7%
Good	8	7%

Fair	1	1%
Poor	1	1%
Not applicable	102	85%
Total	120	

Survey Participants: 129
 Question Respondents: 120
 No Response Count: 9
 Response Rate: 93%

Figure 108: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
High	5	4%
Moderate	16	13%
Low	101	83%
Total	122	

Survey Participants: 129
 Question Respondents: 122
 No Response Count: 7
 Response Rate: 95%

Figure 109: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	6	5%
Moderate	12	10%
Low	102	85%
Total	120	

Survey Participants: 129
 Question Respondents: 120
 No Response Count: 9
 Response Rate: 93%