

COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT



*REPORT ON FERNIE & AREA
SPRING 2016*



The Fernie Chamber of Commerce is a membership driven organization focused on being a vibrant organization recognized for its valuable contribution to the community.



The City of Fernie Official Community Plan supports the surveying of local businesses to understand the needs of business. This project was undertaken with financial support from the City of Fernie.



The Fernie and area Retention and Expansion project is focused on identifying the needs of our existing businesses. The project was undertaken with financial support from the Columbia Basin Trust.



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

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 75 businesses in Fernie and area, or about 1 in 6 companies. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

KEY RESEARCH FINDINGS

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Retail and Wholesale Trade' and 'Accommodation and Food Service' under the North American Industry Classification system. However, it is important to note that the BRE deliberately focused on these sectors for this study.
	The quality of the product and the workforce were the most frequently cited reasons given for success in Fernie and area.
	Most companies surveyed have been in business for between 5 and 9 years.
	Over half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 1,072 employees.
	The majority of employees are full-time.
	Sales/Marketing and Business Management were most commonly listed as key areas for training or professional development.
	The most critical considerations for employees is the cost of living and housing.
Sales	Businesses indicated the market for their product/service is mostly either increasing or stable.
	71% of businesses report that the majority of their sales are to customers within the community or region.
	The most frequent reason for purchasing products or services outside of the area is that the product is not available locally.
Facilities and Equipment	62% of businesses lease the facility in which they operate, and 65% would prefer to own their facility.
	Just under half of businesses plan to expand within 3 years, with the vast majority indicating that expansion will occur within the community.
	Top recorded barriers to expansion are the lack of skilled staff and the lack of suitable premises.
Government Services	Top rated government services include access to the US border, access to highway/roads, and telecommunications. The lowest ratings include availability of buildings for lease or purchase, availability of appropriately zoned land, availability of rail transport facilities, and access to airport facilities.
	Improvements to the land use/zoning regulations and the recycling and waste management systems are the government services most in need of improvement.
	The Calgary International Airport is the most used airport by local businesses, followed by the Canadian Rockies International Airport (Cranbrook).

Business Climate	The overall business climate was rated as good by most businesses, 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 the chamber of commerce, the cultural and recreational amenities, and tourism services.
	Tourism, educational services, and construction were the 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 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 52% of businesses and excellent by 33% of businesses.
	None of the businesses surveyed indicated that they were at high risk of closing and just 2% indicated they are at high risk of downsizing.

NEXT STEPS AND POTENTIAL ACTIONS

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

Workforce – Recruitment & Retention

The businesses interviewed reported a total of 1,072 employees. The majority (51%) of employees are full-time, followed by 27% part-time employees. 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 38% indicating that the number has increased.

Expected employment trends are also stable with the majority of businesses expecting the number of casual, part time, and full time employees to stay the same. The majority of businesses (88%) recruit locally. 38% of businesses indicate that they currently face recruitment challenges, 55% anticipate future difficulties, and 63% of businesses stated they believe there are strategies that could be undertaken to address employee recruitment.

Additionally, 50% of respondents noted that the lack of skilled staff was posing a barrier to expansion plans. Respondents most commonly rely on advertising when recruiting, followed by word of mouth, the use of recruiting firms, raised wages, job fairs, the internet, and the Canada Job Bank. Actions that could prove helpful include: improved job advertising, assistance with the temporary foreign worker program, and supporting affordable housing.

The hospitality and food/beverage service industries featured in areas of future recruitment challenges, as did the area of administrative/clerical. Targeted actions that focus on the employment that supports the tourism sector could be considered. Related to recruitment and retention, are the critical considerations for employees identified which include the cost of living, housing, and childcare.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with just 8% of essential employees under the age of 25. Increasing youth employment may assist in addressing the recruitment challenges that 38% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low rate of employed youth considered essential, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

60% of businesses in the region report being in a growth cycle and 36% are maturing, and the majority of businesses are anticipating low to moderate sales growth over the next year, with 43% expecting moderate sales growth between 1 – 9% and 34% expecting 10-24% sales growth.

The vast majority of businesses (71%) indicate that the majority of their sales are to local markets, indicating there may be an opportunity to expand into surrounding markets. 49% indicate that they are planning to expand within the next three years. Less than half (46%) of those businesses planning to expand feel their existing site is adequate, and 85% indicated that expansion would occur within the community.

Businesses also report that employment rates are stable, and that they anticipate continued stability over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive, stable report on local business conditions. 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 if appropriate, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to expansion which include the lack of skilled staff, the lack of suitable premises and financing.

It is worth noting that few (31%) businesses sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small to medium in sized and independent. The customer base for businesses appears to be diverse, with 44% of businesses indicating that just 1 - 9% of their sales are generated by their top three customers. Tailoring supports and services to small/medium sized, independent businesses that are focused on the service and tourism sectors will benefit businesses in Fernie and area.

Services and supports should consider that 89% of functions provided by a business are 'services'. Actions to support and encourage small and medium sized businesses could include specific

training targeted to the needs of small businesses, such as providing shared services such as payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include exploring existing supports available from the provincial Small Business BC organisation, Tourism BC, or CBT's Basin Business Advisors Program.

Supply Sourcing and Procurement

The data indicates that 44% of supplies come from within the local region. The most common response (78%) for the reason why supplies are sourced outside of the local area is that they are not available locally.

The ability to source local supplies of meats, dairy, fruits, vegetables, and grains were the most frequently cited by respondents. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area businesses could also be explored. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 52% of businesses *do* have a training budget and 48% indicated that training typically occurs locally. 50% of respondents indicated that the lack of skilled staff was a barrier to their expansion plans. 56% of businesses were aware of new trends, technologies and industry changes that will require new skills. Areas identified for training include sales/marketing skills, business management, customer service, and food safe/first aid/safety.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 12% of respondents indicated that they have a formal succession plan and just over half (51%) have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future business planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Continued Support for Tourism Sector

The community of Fernie is already invested in the tourism sector with a relatively high percentage (42%) of businesses engaged in tourism related industries (20% in the 'Retail and Wholesale Trade' sector and 13% in the 'Accommodation and Food Services' sector, and 9% in the 'Arts, Entertainment and Recreation' sector). An overwhelming 93% of respondents indicated that tourism was the economic driver with the greatest growth potential. Respondents also noted that

increasing the number of tourism related businesses, educational services, and construction related businesses would benefit the region. Actions to increase and support the tourism industry could include the continued collaboration between government and local tourism agencies such as Destination British Columbia, Tourism Fernie, the Fernie Chamber of Commerce, and local businesses. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Government Services

A recurring theme was the lack of buildings and land available for lease or purchase, with 42% of respondents indicating that the lack of suitable premises was a barrier to expansion, and 17% suggesting that changes to the land/use and zoning would improve the government services available.

With 49% of businesses planning expansions over the next three years, and 54% of those indicating that their site is currently not adequate to support those plans, there is an opportunity for the local government to work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the lack of available land may be addressed through communication strategies between the local government, local businesses, and the community.

Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

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PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey¹ conducted within the Fernie and area during the Winter/Spring 2016.

The project was led by the Fernie Chamber of Commerce with support from the City of Fernie and the Columbia Basin Trust. Interviews were completed by a local research consultancy firm and BRE Lead (Chamber Executive Director). A BRE Advisory Committee, including a Chamber Board Member, a City Administration representative, and community business leaders helped guide the process.

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

THE BRE CONCEPT

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

PROJECT OBJECTIVES

Objectives specific to the Fernie 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, as well as following-up where assistance can be provided;
3. Demonstrate the Chamber's supportive role to commerce in Fernie and build relationships with the entire business community; and
4. Encourage the business community's active involvement in economic development.

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

RESEARCH CONSIDERATIONS

THE BRE SURVEY

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data 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 within Fernie and area.

THE DATA SET

The City of Fernie and surrounding area, including businesses in the Hosmer area made up the geographic scope of the study area.

A complete list of business licenses in Fernie was collected from the City of Fernie. Businesses were sorted into the North American Industry Classification System (NAICS) categories to ensure equal representation of each sector. There was an emphasis on tourism and retail sectors.

The survey was advertised in local news publications, through social media channels, and the Chamber of Commerce newsletter and events to invite businesses to participate. Businesses were contacted by phone and by email to solicit participation.

In total, 75 businesses took part in a one-on-one interview with the research consultant. Responses were entered into a confidential database. Due to time constraints of the interviewee, 3 of the 75 businesses did not participate in the thirteen additional questions developed specifically for the region.

DATA COLLECTION

Interviews were arranged by phone and by email. Businesses were invited to participate through advertisements in local publications, call for participants at Chamber events, and invitation in Chamber newsletters. Securing participation took 45-60 minutes per business. Face-to-face interviews took between 45 to 90 minutes to complete. Data entry took 30-45 minutes per survey.

Interviews were completed by three individuals. Capasiti Consulting principals Cindy Pearson (25) and Steve Thomson (19), and Chamber Executive Director Patty Vadnais (31).

DATA INPUT, ANALYSIS AND REPORTING

A Chamber of Commerce employee was responsible for entering all data into the system. All interviewers and data entry clerk signed confidentiality agreements. Completed surveys were stored in a locked filing cabinet in the office of the Chamber Executive Director.

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

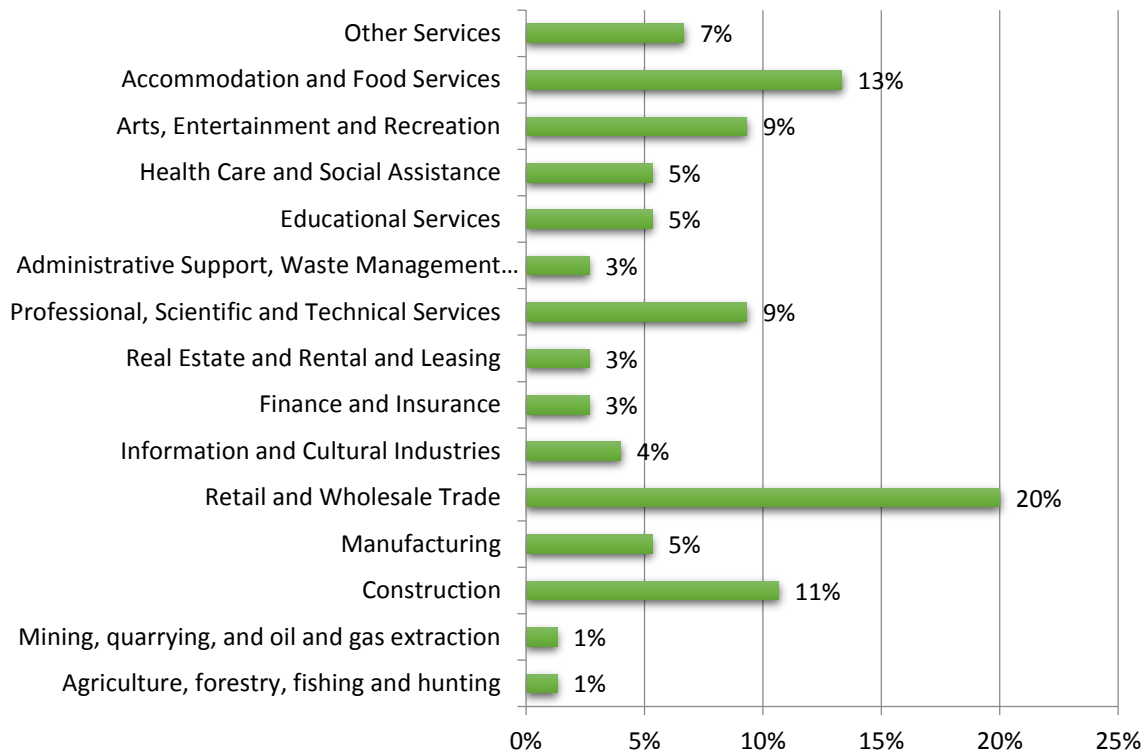
RESEARCH FINDINGS²

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries, with an emphasis in the tourism and service sectors. Most common are Retail and Wholesale Trade (20% or 15 respondents), Accommodation and Food Services (13% or 10 respondents), and Construction (11% or 8 respondents).

Figure 1: Industry classification



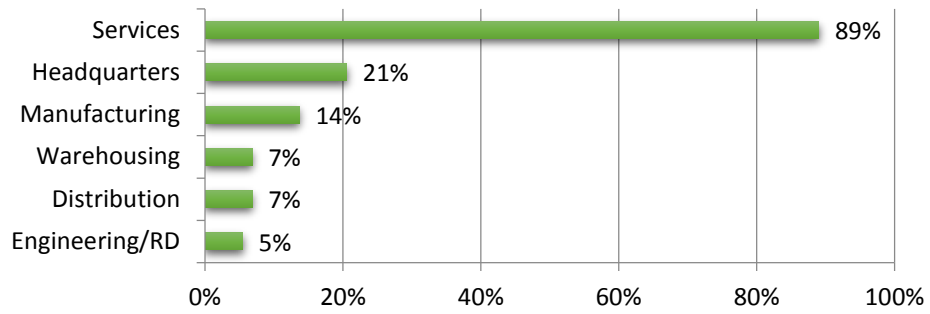
Note: 75 respondents

Facility Function

The vast majority of respondents (89% or 65 respondents) indicated that their facility provides services. Other primary functions include 'headquarters' (21% or 15 respondents) and 'manufacturing' (14% or 10 respondents). Fewer respondents indicated that their facility serves an engineering/research and development function, distribution or warehousing function.

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

Figure 2: Facility function(s)

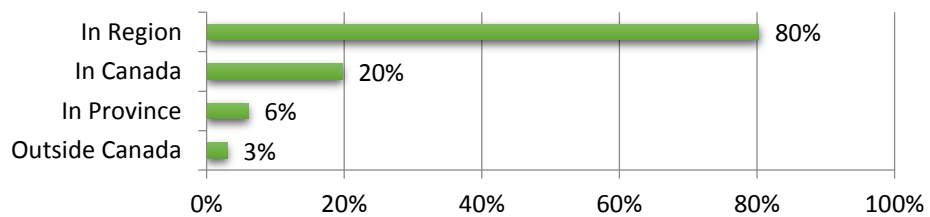


Note: 73 respondents

Competition

The vast majority of competition (80 % or 53 responses) reported was coming from within the regional area³.

Figure 3: Location of primary competitors



Note: 66 respondents

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



Factors for Success

Figure 4: Key words and 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 the quality product (16% or 12 businesses), workforce (12% or 9 businesses), and demand for products/services (12% or 9 businesses) was also discussed frequently.

“Resort ski hill brings tourists to town.”

“Longevity, staff, product and service consistency, focus on local customers needs.”

“Support from other small businesses drives the business.”

“Professional services in a timely manner. Relationships are important to the success of the business.”

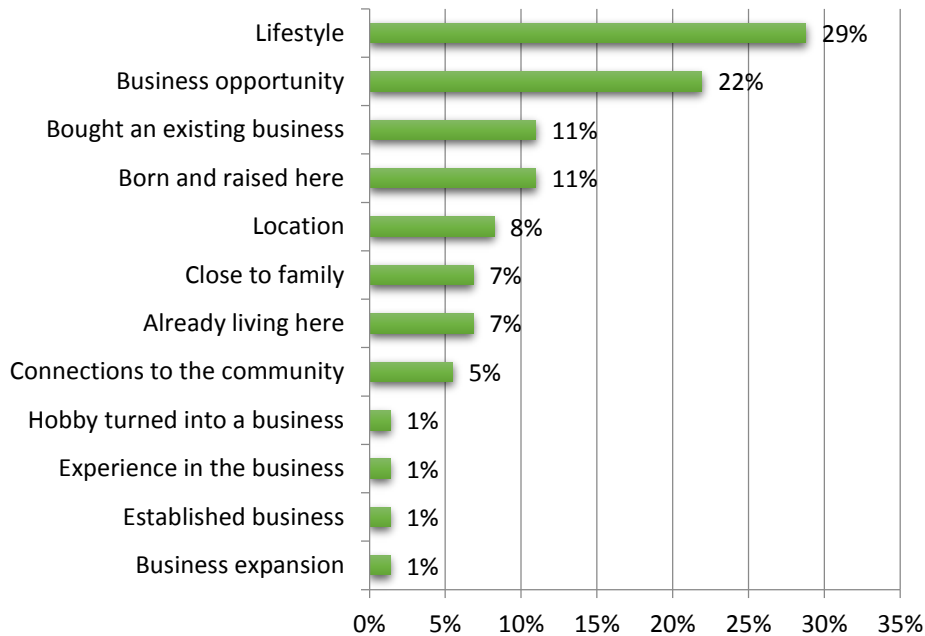
“Local, employees live in Fernie and are community minded.”

“Good product. Have niche services that aren't easily replicated.”

Choosing Fernie

Respondents most frequently cited the lifestyle (29% or 21 respondents) followed by a business opportunity (22% or 16 respondents). Other factors include the purchase of an existing business (11% or 8 respondents) and those who were born and raised and stayed.

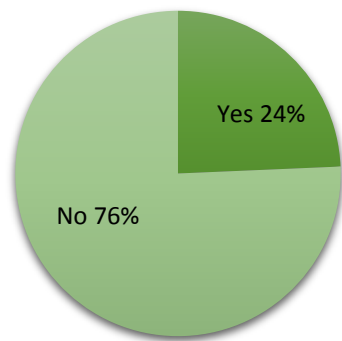
Figure 5: Choosing Fernie



Note: 73 respondents

Other Locations

Figure 6: Other Locations

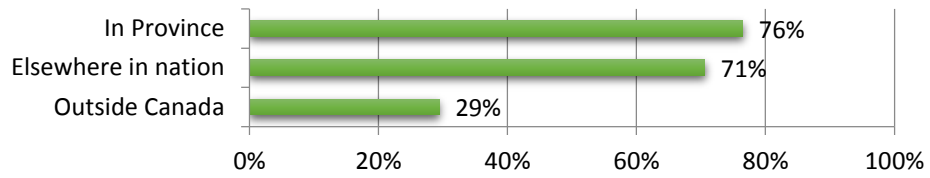


24% of respondents (18 respondents) indicated that their company has other locations.

Note: 74 respondents

76% of those other locations (13 respondents) are in other areas of the province, 71% (12 respondents) are in other parts of Canada.

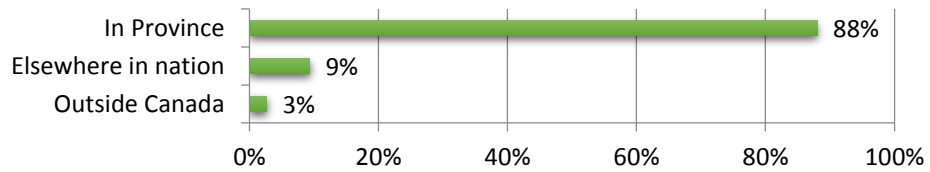
Figure 7: Location of Other Locations



Note: 17 respondents

88% (66 businesses) of respondents reported that their headquarters are located within British Columbia, 9% (7 businesses) indicated that they are headquartered in other parts of Canada, while 3% (2 businesses) have headquarters outside of Canada.

Figure 8: Location of headquarters

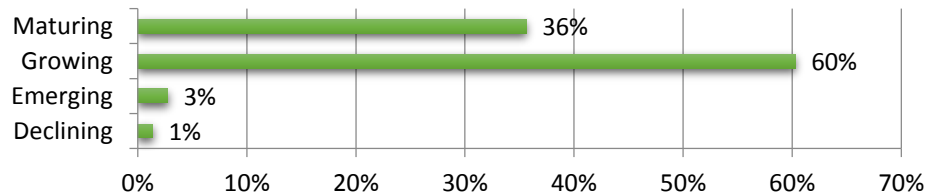


Note: 75 respondents

Age and Life Cycle Stage

Over half of all respondents (60% or 44 respondents) reported that their business is in the 'growing' life cycle stage. Another 36% (26 businesses) indicated that their business is in the 'maturing' stage. Only 3% (2 businesses) indicated that they are in the 'emerging' stages, while just 1% (1 business) indicated they were declining.

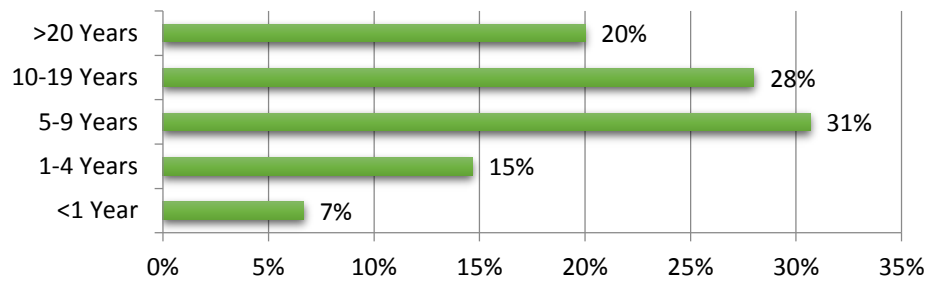
Figure 9: Life cycle stage



Note: 73 respondents

Most businesses (23 respondents or 31%) reported that they have been in business for between 5 and 9 years. A significant number reported that they have been in business for 10 - 19 years (21 respondents or 28%), over 20 years (15 respondents or 20%), and 1 – 4 years (11 respondents or 15%).

Figure 10: Length of time in business

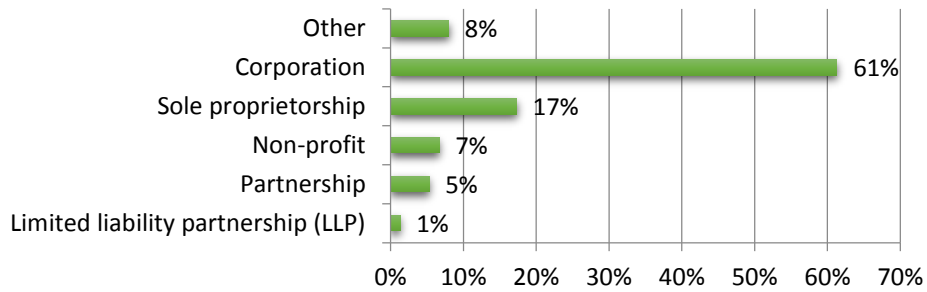


Note: 75 respondents

Ownership and Management

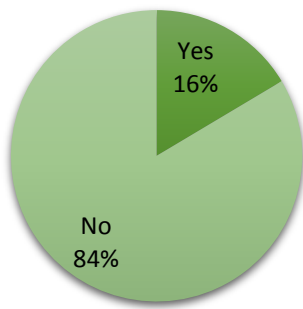
94% of all companies are privately owned, with just 6% publicly owned. Most respondents (46 respondents or 61%) indicated that their business is classified as a corporation, while 17% (13 respondents) indicated that they are a sole proprietorship. The remainder of businesses identified as other (8% or 6 respondents), non-profit (7% or 5 respondents), partnership (5% or 4 respondents), or limited liability partnership (1% or 1 respondent).

Figure 11: Type of business



Note: 75 respondents

Figure 12: Ownership and management changes in last 5 years



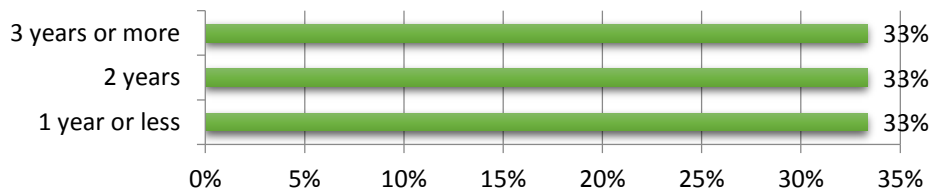
84% of businesses (61 businesses) have not seen a management or ownership change in the last 5 years, while 16% of businesses (12 businesses) have changed management and/or ownership over that same period of time. Just 9% of businesses (7) are expecting an ownership change in the near future. Of the 12 respondents that have seen changes in management and or ownership, 80% (8 businesses) report that the change had a positive impact.

Note: 73 respondents

Succession and Business Plans

Of the 7 businesses (9%) that reported a pending ownership change, 2 (33%) expect the change will happen in a year or less, 2 (33%) expect the process to take 2 years, and 33% or 2 businesses anticipates it taking 3 or more years.

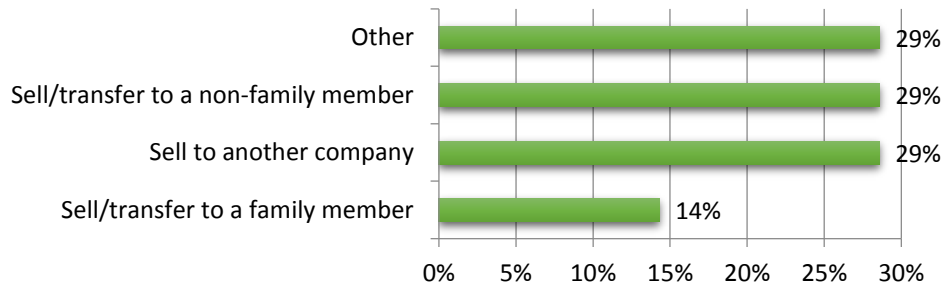
Figure 13: Anticipated timeline for ownership change



Note: 6 respondents

29% of respondents (2 respondents) expect that the current owner will exit the business by selling it to a non-family member, while 29% (2 respondents) expect it to be sold/transferred to another company. 14% (1 business) expect it to be sold to a family member.

Figure 14: Anticipated exit strategy



Note: 7 respondents

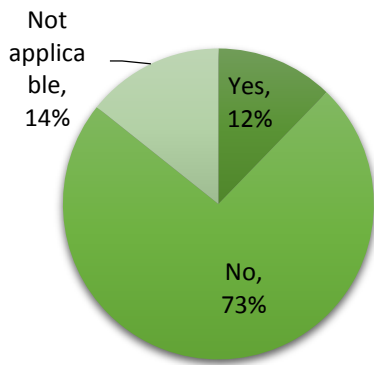


Figure 15: Existence of formal succession plan

Only 12% (6 respondents) of businesses reported that they have a formal succession plan in place, and just 17% have identified a successor for their business. Of those that completed a succession plan, 100% received assistance in its preparation.

Note: 49 respondents

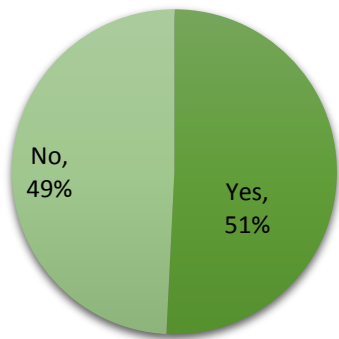


Figure 16: Existence of current business plan

Just over half of all respondents (51% or 32 respondents) indicated that they have a business plan in place.

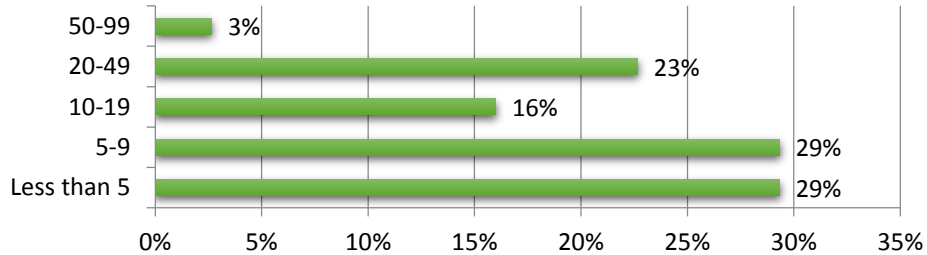
Note: 63 respondents

LOCAL WORKFORCE

Size of Workforce

The 75 businesses interviewed reported a total of 1,072 employees. 29% or 22 of the businesses surveyed indicated that they have less than five employees and another 29% or 22 businesses indicated that they have between 5 and 9 employees.

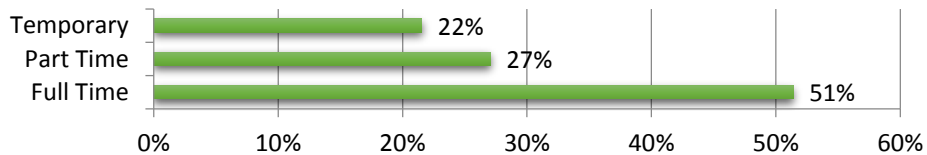
Figure 17: Total number of employees



Note: 75 respondents

51% (551) of employment positions at surveyed businesses are full-time, while 27% (290) are part-time and 22% (231) are temporary.

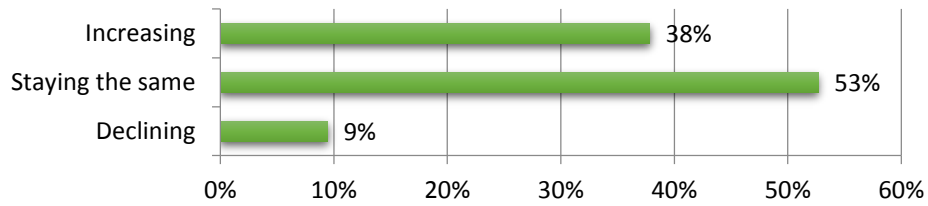
Figure 18: Nature of employment



Note: 75 respondents

53% of respondents (39 businesses) indicated that the number of employees at their business has stayed the same historically. While 38% (28 businesses) indicated that the size of their workforce has increased. 9% (7 businesses) indicated a decrease.

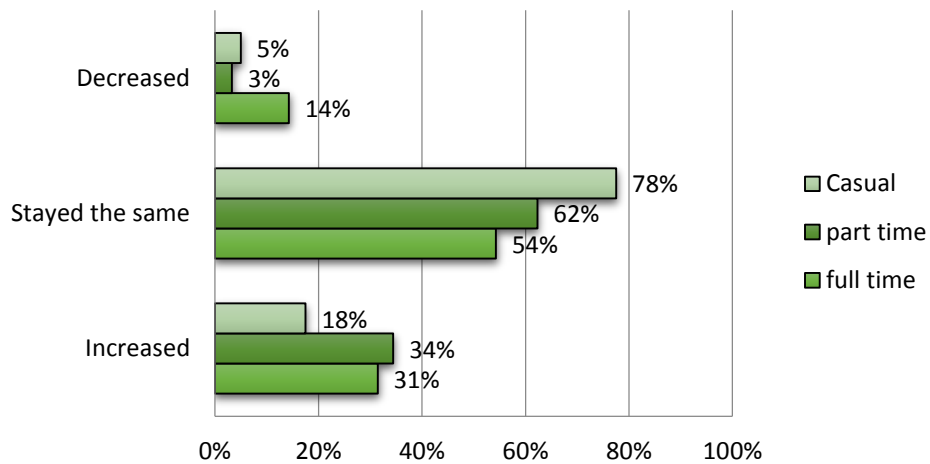
Figure 19: Historical Employment trend⁴



Note: 75 respondents

The last three years has generally seen stability in the size of the workforce, with between 54% and 78% of businesses reporting that the number of employees has stayed the same, and between 18% and 34% reporting that employment over that three year time period has increased. Interestingly the employment trend for full-time, part-time, and casual employment were generally consistent over the previous three years.

Figure 20: Employment trend over last 3 years

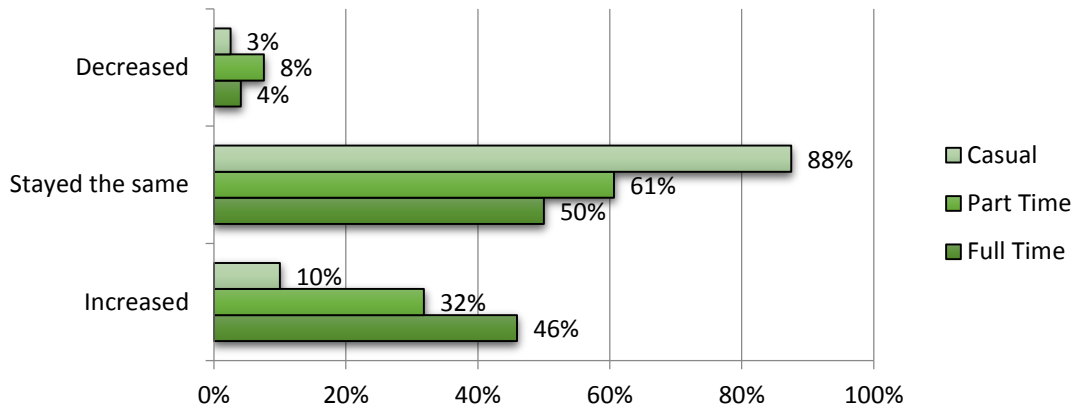


Note: #of respondents varies

The majority of businesses interviewed expect the size of their workforce to stay the same over the next 3 years.

⁴ The question considered a 10 year historical trend.

Figure 21: Employment trend over next 3 years

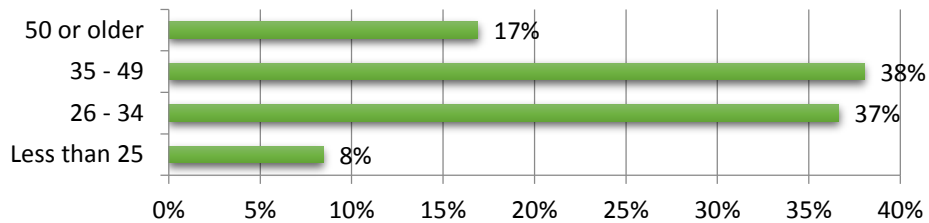


Note: #of respondents varies

Workforce Demographics

38% (27 respondents) indicated that the majority of their essential employees are between 35 and 49 years old. 37% (26 respondents) of businesses indicated that their workforce is between 26 and 34, and just 8% (6 businesses) have a workforce under the age of 25.

Figure 22: Age of the majority of essential employees



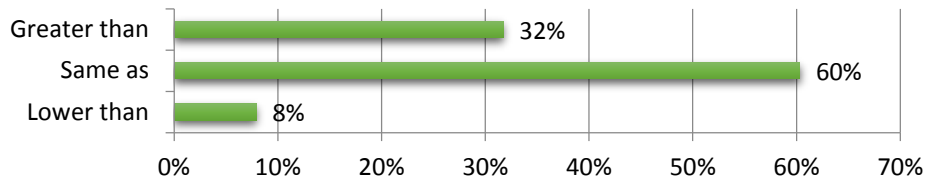
Note: 71 respondents

Wages

When reporting on average wages for skilled or professional workers, the majority of responses indicated they pay between \$20 and \$29 per hour (42% or 22 businesses) and between \$30 and \$49 per hour (23% or 12 businesses). The most commonly reported average hourly wage for semi-skilled workers (29% or 12 businesses respectively) was between \$15 - \$19 and \$20 - \$29 and the most commonly reported average wage for entry-level workers (47% or 18 businesses of respondents) was between \$10 and \$12. 60% of respondents (38 respondents) reported that their wage scale is similar to other businesses in the region.⁵

⁵ Detailed wage data is found in Appendix A.

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

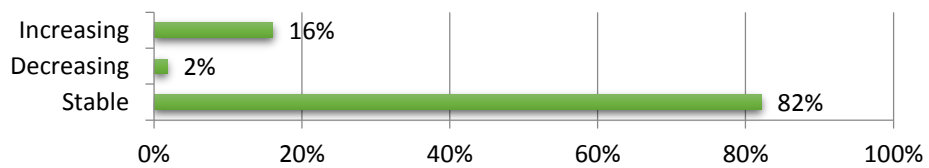


Note: 63 respondents

Recruitment and Retention

Of those businesses that responded, 82% (46 respondents) indicated that the number of unfilled positions at their company would remain constant.

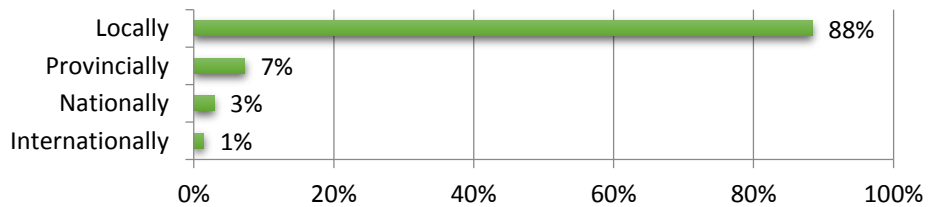
Figure 24: Trend in unfilled positions



Note: 56 respondents

The vast majority of respondents (88% or 61 respondents) reported that they primarily recruit employees from local labour markets. 7% (5 respondents) recruit provincially, while 3% (2 respondents) report that they recruit at the national level. International recruitment was only identified by one respondent.

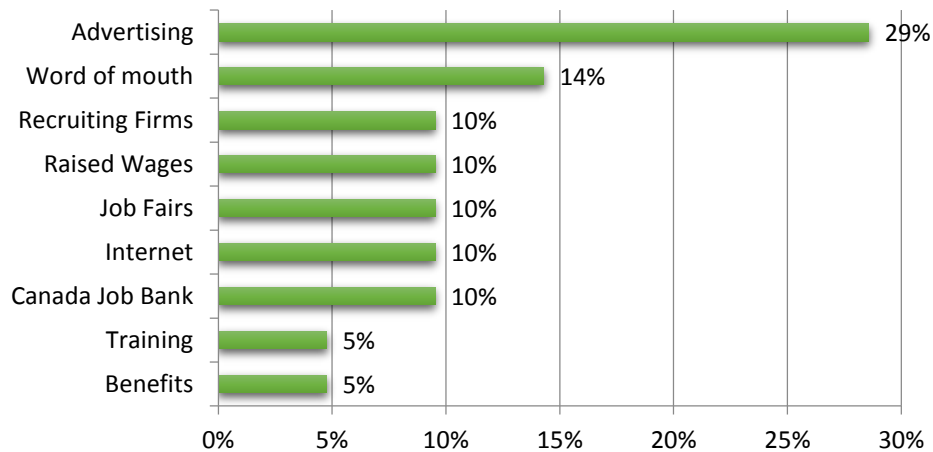
Figure 25: Location of workforce recruitment



Note: 69 respondents

Of 75 respondents, 38% (28 respondents) indicated that they have experienced recruitment challenges and 24% (17 respondents) indicated that they have experienced retention challenges.

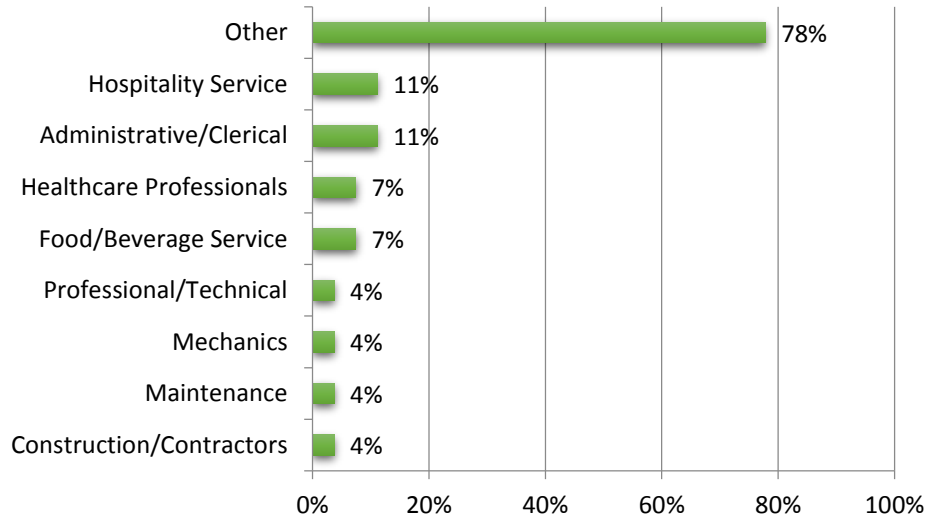
Figure 28: Recruitment Activities



Note: 21 respondents

Of the 28 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include the hospitality service industry (11% or 3 respondents) and administrative/clerical (11% or 3 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

Figure 29: Current recruitment areas

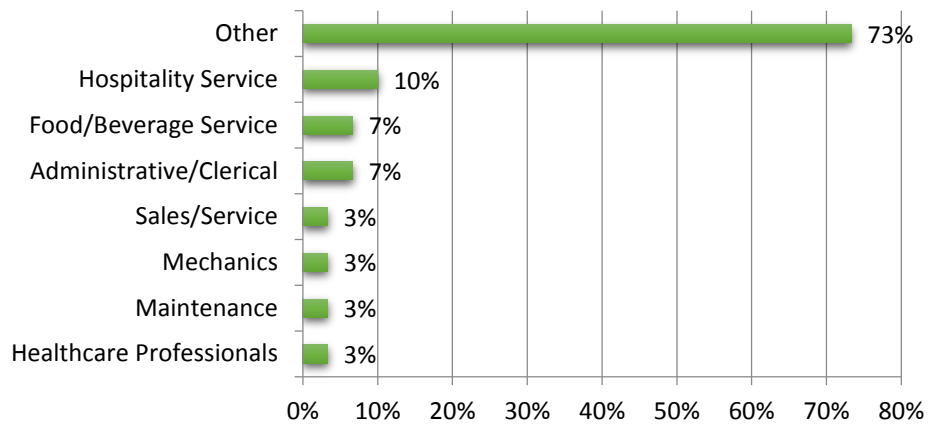


Note: 27 respondents

55% of respondents (39 businesses) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include hospitality service (10% or 3 respondents), food/beverage service and administrative/clerical (7% or 2 respondents)

respectively). The responses included in the ‘other’ categories charted below are detailed in Appendix A.

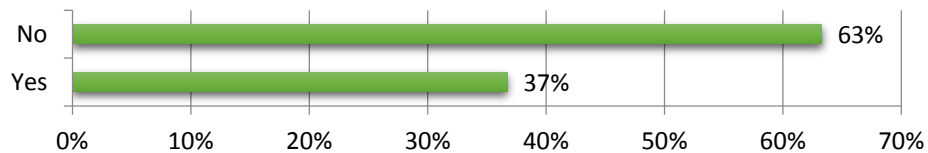
Figure 30: Future areas where recruitment may be challenging



Note: 30 respondents

63% of respondents (31 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment. 28% (5 respondents) believed that better job advertising could be effective, while 22% (4 respondents) suggested help with the foreign worker program and another 11% (2 respondents) suggested supporting affordable housing.

Figure 31: Strategies to overcome employee recruitment challenges

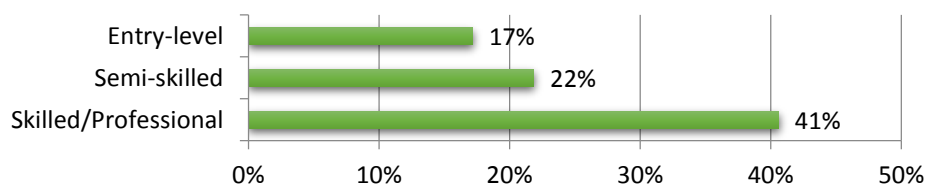


Note: 49 respondents

Skills and Training

The majority of respondents (41%) indicated that over half of their workforce is comprised of skilled or professional workers, 22% indicated that their workforce is mainly semi-skilled workers, and 17% indicated that entry-level workers make up the majority of their workforce.

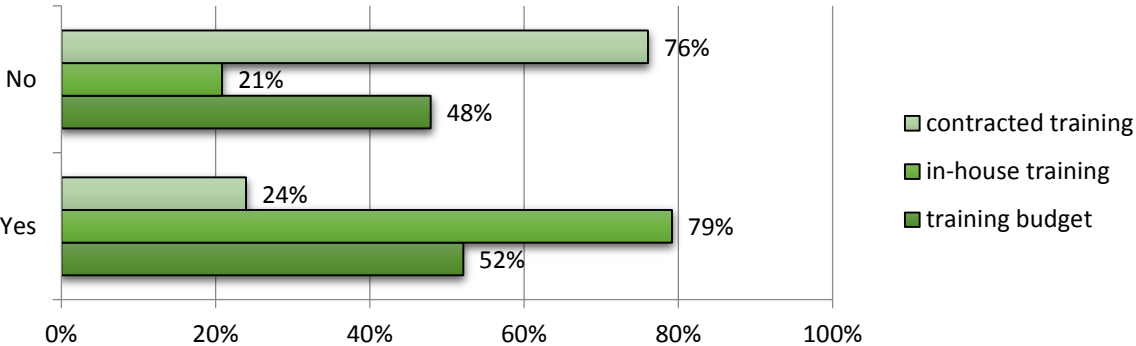
Figure 32: Skill level of majority of workforce



Note: # of respondents varies

52% (37 businesses) indicated that there is a training budget to upgrade employee skills. 79% (57 businesses) indicated that their company offers in-house training and 24% (17 businesses) use contracted training.

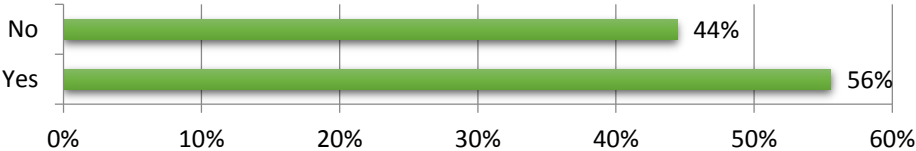
Figure 33: Training Budget



Note: # of respondents varies

56% of respondents (40 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 34: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 72 respondents

67% or 48 respondents indicated that there are areas of training or professional development that would be of benefit. Most commonly listed among these areas were sales/marketing skills (20% or 9 businesses), business management (16% or 7 businesses), and customer service (14% or 6 businesses).

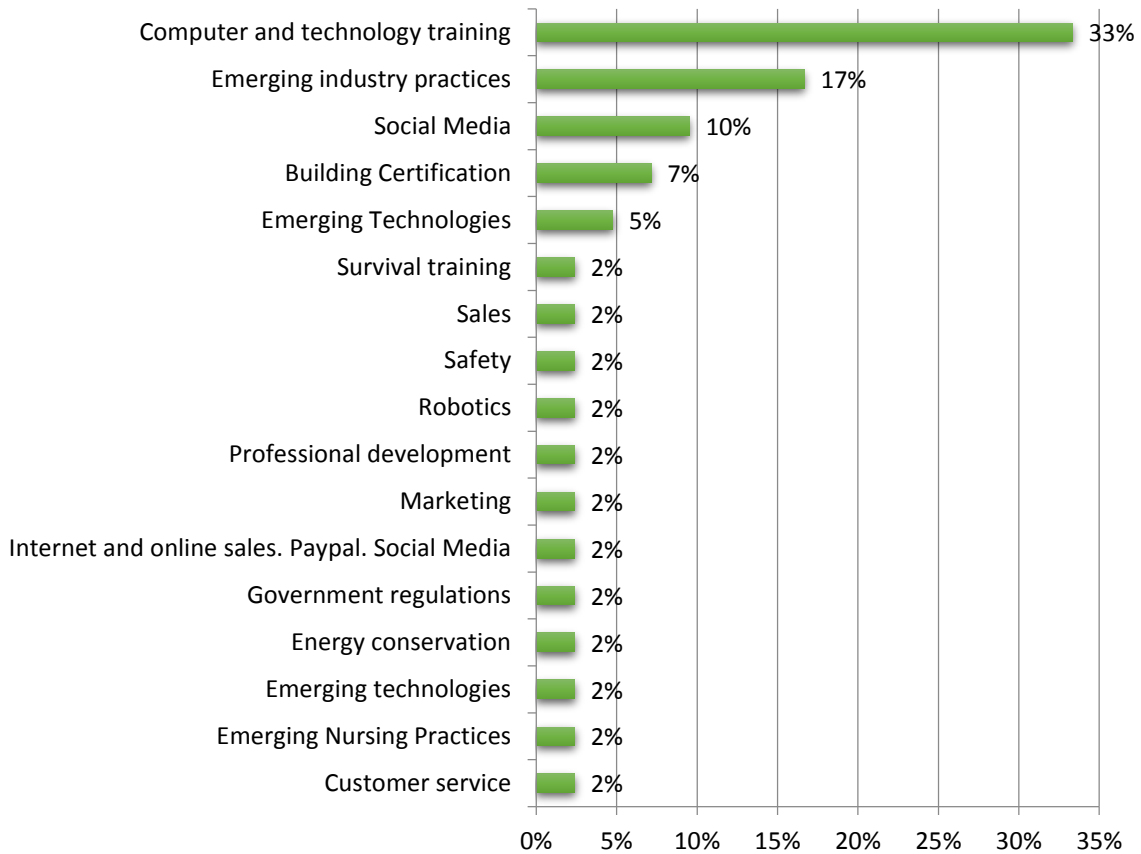
Figure 35: Training or professional development needs



Note: 44 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 computer skills (33% or 14 businesses), emerging industry practices (17% or 7 businesses), and social media (10% or 4 businesses).

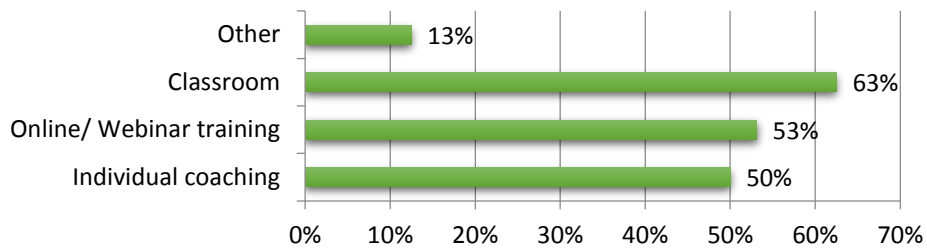
Figure 36: Areas for new Training in next five years



Note: 42 respondents

63% of respondents (40 businesses) stated that they prefer training when it is delivered through a classroom setting, while 53% (34 businesses) preferred an online/webinar format, and 50% had a preferred for individual coaching (32 businesses).

Figure 37: Preferred modes of training

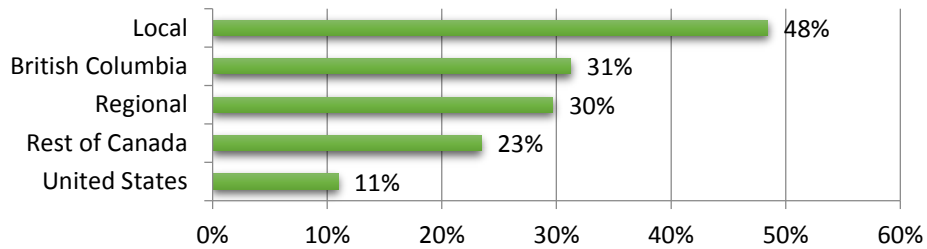


Note: 64 respondents

48% of respondents (31 businesses) typically seek training opportunities that are offered locally, and 31% (20 businesses) travel to other areas in the province for their training or within the region

(30% or 19 businesses). Fewer training opportunities are sought elsewhere in the country or in the United States.

Figure 38: Usual training locations



Note: 64 respondents

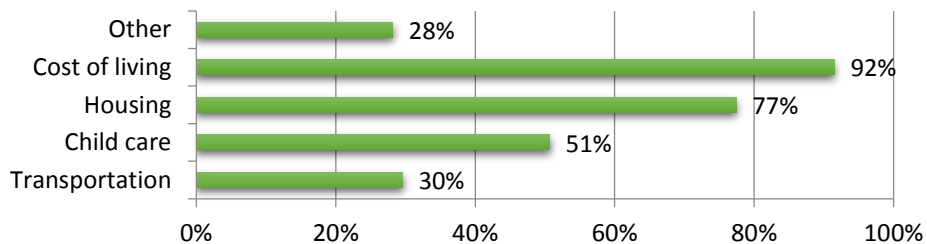
Unions

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

Employees

The most frequently cited critical issues for employees are the cost of living (92% or 65 businesses) and housing (77% or 55 businesses). Child Care (51% or 36 businesses) and Transportation (30% or 21 businesses) issues were also cited. For a list of factors included in the “other” category charted below, refer to Appendix A.

Figure 39: Critical considerations for employees



Note: 71 respondents

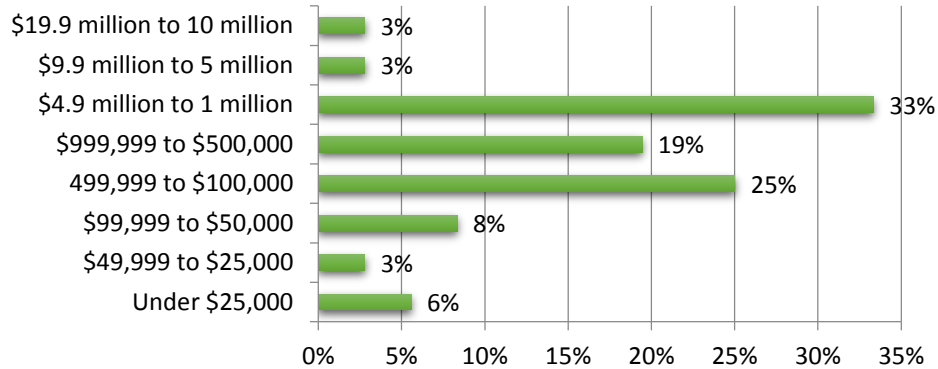
92% of businesses (66 businesses) interviewed reported that over 75% of their employees live within the community, 7% (1 business) indicated that 75% of the employees live elsewhere in the region, and 33% (2 businesses) indicated that over 50% of their workforce lives outside of the region.

SALES

Market Size and Share

The highest number of respondents (12 businesses or 33%) reported annual sales between \$1 million and \$4.9 million. The second highest number of respondents (9 businesses or 25%) reported annual sales of between \$100,000 and \$499,000.

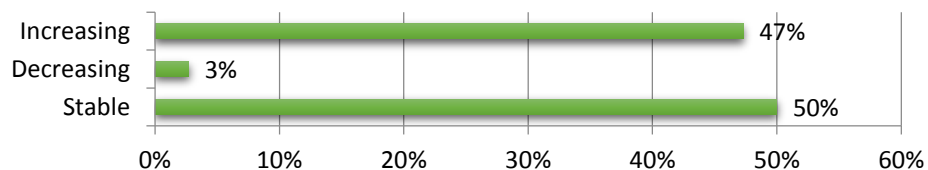
Figure 40: Annual sales



Note: 36 respondents⁶

Half of businesses interviewed (50% or 37 businesses) indicated that the size of the market for their product or service is stable. Another 47% (35 businesses), reported that the market is increasing.

Figure 41: Status of market for product/service

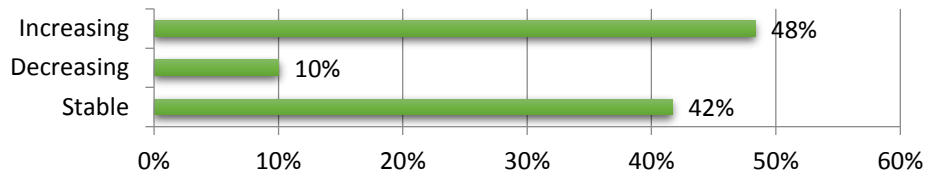


Note: 74 respondents

48% (29 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 42% (25 businesses) indicated that it is stable. A small number of respondents (10% or 6 businesses) indicated that their market share is decreasing.

⁶ Note: question was optional for respondents.

Figure 42: Market Share in Comparison to Competitors

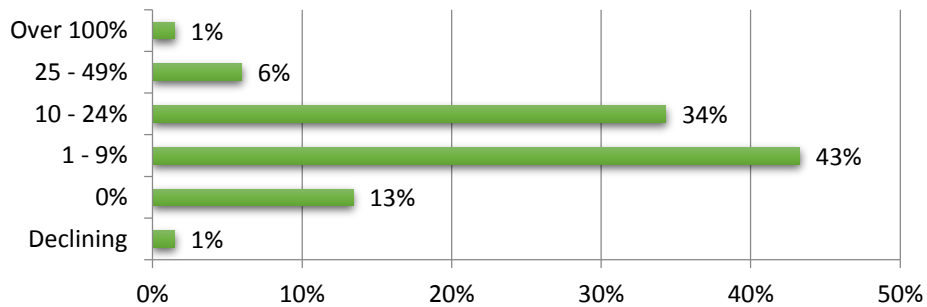


Note: 60 respondents

Growth

43% of respondents (29 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 34% of respondents (23 businesses). A combined 7% (total of 5 businesses) expect strong sales growth of over 25%. 13% (9 businesses) of respondents expect their sales to remain stagnant, while a further 1% (1 business) expect sales to decline.

Figure 43: Projected sales growth in the next year



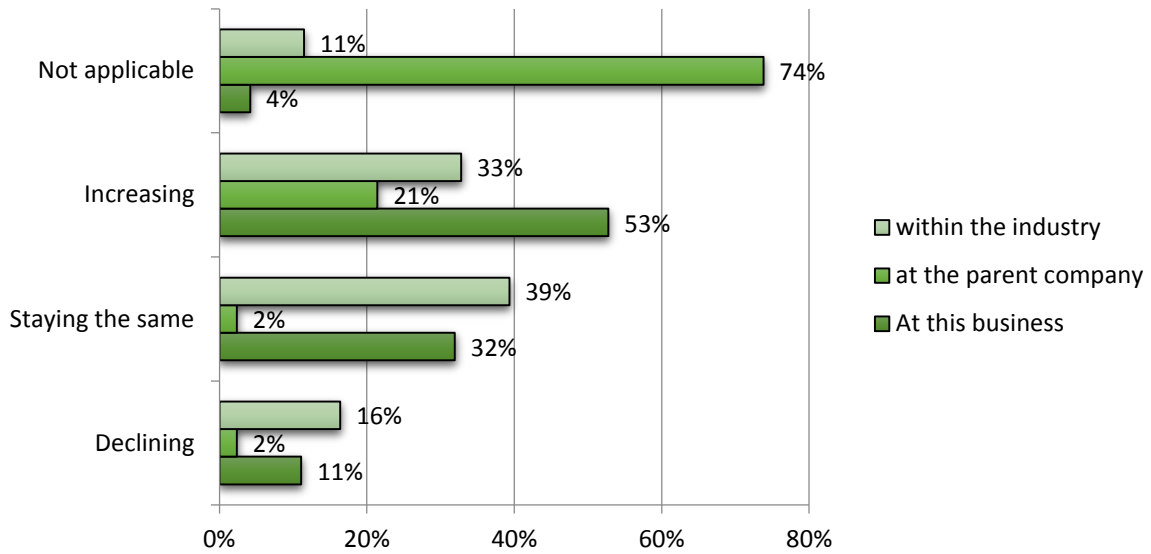
Note: 67 respondents

The majority of responses (53% or 38 businesses) indicated that sales at their business have increased over time, 32% (23 businesses) indicated that sales have remained relatively stable, and 11% (8 businesses) reported that sales have declined.

21% or 9 businesses reported that sales at their parent company have historically increased, 2% (1 business) reported that they have stayed the same, and 2% (1 business) reported a decline. It is worth noting there was a high non response/not applicable response to this question.

Data indicates that the sales trend within respondents' respective industries has more closely followed the sales trend reported at the location rather than the parent company. 39% of respondents (24 businesses) reported that sales within their industry have been staying the same, while 33% (20 businesses) reported that they have been increasing, and an additional 16% (10 businesses) indicated sales in their industry are declining.

Figure 44: Historic sales trend

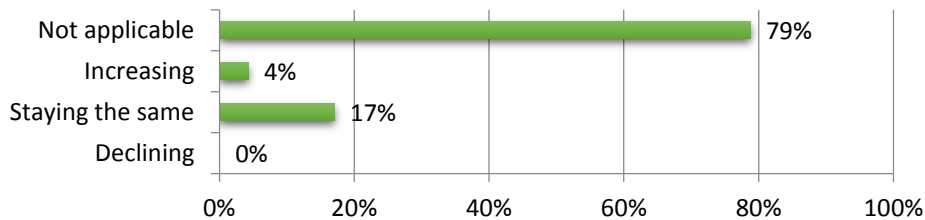


Note: # of respondents varies

Export Sales

Of the 10 businesses that reported exporting to international markets, 17% (8 businesses) indicated that their export sales have stayed the same, 4% (2 businesses) indicated that they have been stable, and none reported any decline in sales.

Figure 45: Export sales

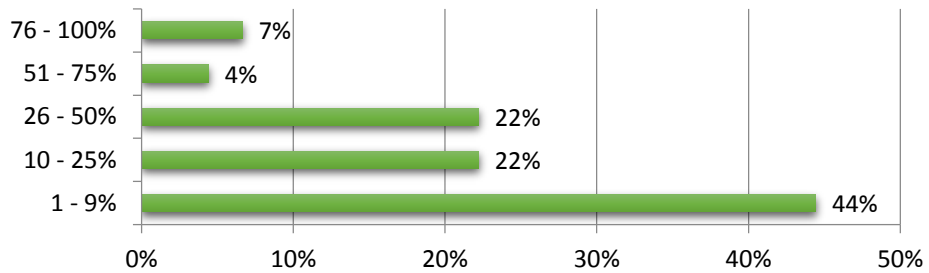


Note: 47 respondents

Source of Sales

The customer base among Fernie businesses appears to have a diverse customer base, with the largest percentage of respondents (44% or 20 businesses) indicating that 1 – 9% of their sales are generated by their top three customers.

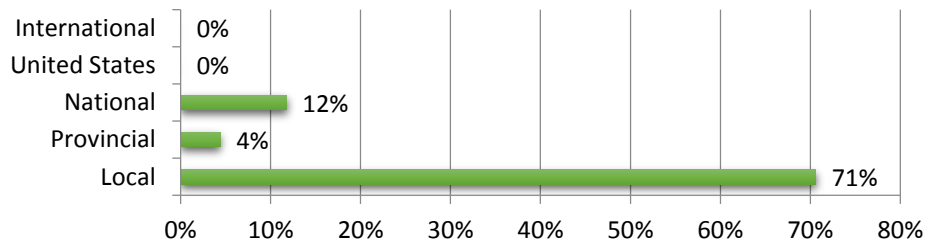
Figure 46: Sales generated by top three customers



Note: 45 respondents

A majority of respondents (71%) indicated that over 50% of their sales are to customers within the local community or region. 4% indicated that over 50% of their sales are within the province and 12% indicated the majority of sales to a national market. There were no respondents that reported that the majority of their sales to the U.S. or to international markets. Additionally, when asked whether they supply products or services to any company in the community, 68% (50 respondents) indicated that they did.

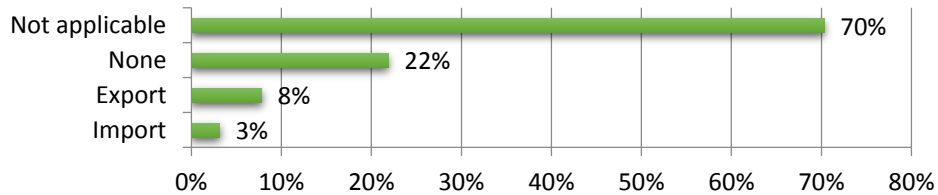
Figure 47: Geographic source of majority of sales



Note: # of respondents varies

Just 2 respondents (3%) indicated that they import goods or services from other countries and 5 respondents (8%) indicated that they export goods or services to other countries. 92% of respondents did not find the question applied to them, or responded that they had no international trade status.

Figure 48: International trade status



Note: 64 respondents

Procurement

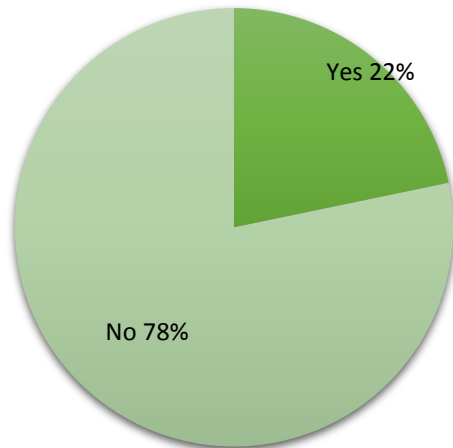


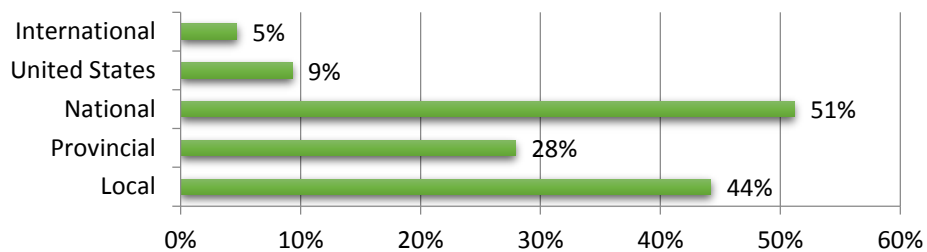
Figure 49: Engagement with government procurement processes

Only 22% (15 respondents) indicated that they engage in government procurement (i.e., providing products or services to governments and public-sector organizations).

Note: 69 respondents

51% of respondents (22 businesses) interviewed reported that they purchase a majority of their supplies from national sources. 44% (19 businesses) indicated that the majority of their supplies come from businesses located within the local area.

Figure 50: Geographic source of majority of supplies

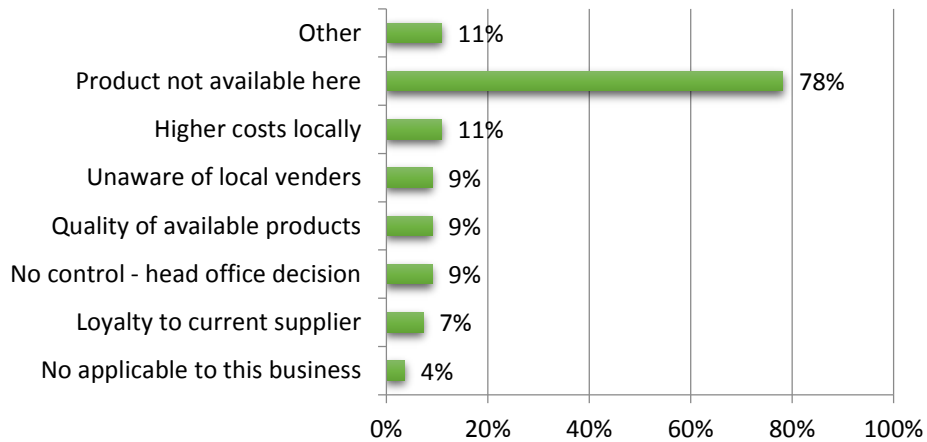


Note: # of respondents varies

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (78% or 43 businesses) indicated that the products they need are not available locally.

Figure 51: Reason for out-of-area purchasing



Note: 55 respondents

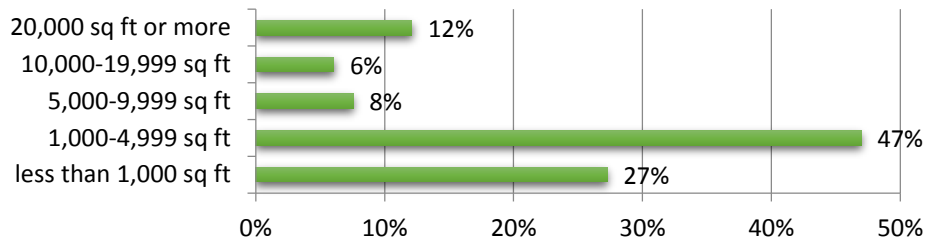
The most commonly referenced products that businesses stated they would like to source from a local supplier include meats, dairy, fruits, vegetables, and grains.

FACILITIES AND EQUIPMENT

Size and Condition

47% (31 businesses) of respondents reported that their facility is between 1,000 square feet and 4,999 square feet in size, and another 27% (18 businesses) indicated it was less than 1,000 square feet.

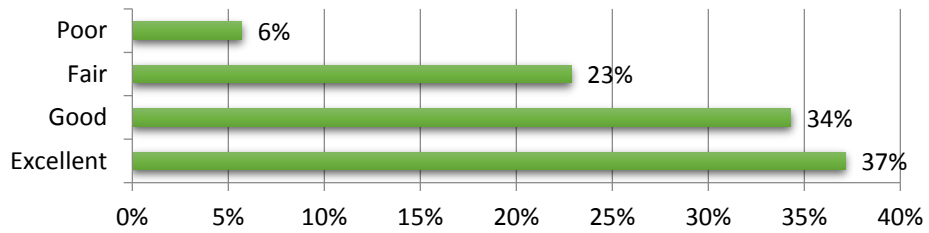
Figure 52: Size of facility



Note: 66 respondents

37% of respondents (26 businesses) indicated that their facility is in excellent condition. Another 34% (24 businesses) indicated that it is in good condition and 23% (16 businesses) reported that their facility is in fair condition. 6% (4 businesses) reported that their facility is in poor condition.

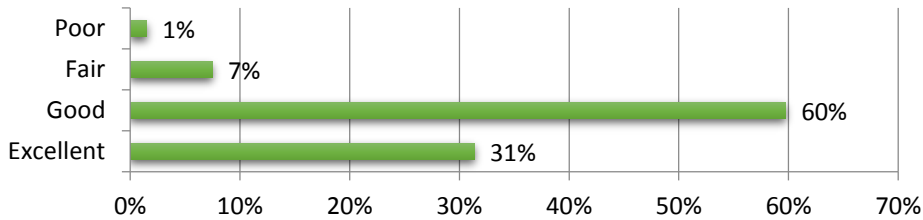
Figure 53: Condition of facility



Note: 70 respondents

60% (40 businesses) of respondents indicated that their equipment is in good condition. 31% (21 businesses) indicated that it is in excellent condition, 7% (5 businesses) report their equipment is in fair condition, and just 1% (1 business) is in poor condition.

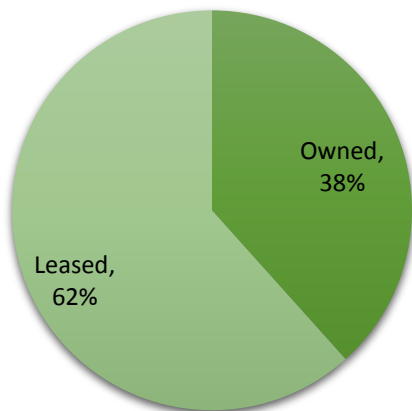
Figure 54: Condition of equipment



Note: 67 respondents

Ownership

Figure 55: Ownership status of facility

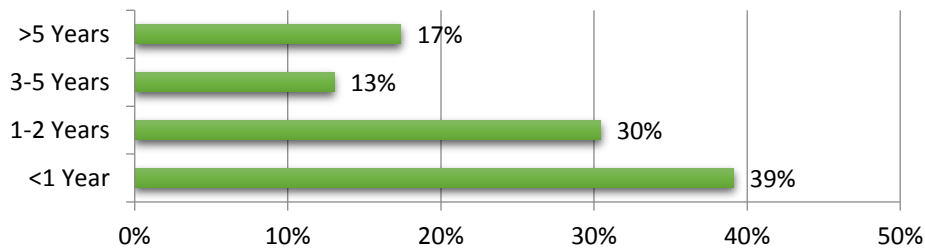


62% of respondents (45 businesses) lease the facility in which they operate and 38% (28 businesses) own it.

Note: 73 respondents

Of the 45 businesses that lease their facility, and provided a response to the question, 39% have less than 1 year remaining on their lease and another 30% have between 1 and 2 years remaining. The majority of respondents that lease their facility (81% or 34 businesses) intend to renew their current lease agreement.

Figure 56: Length of time remaining on lease



Note: 23 respondents

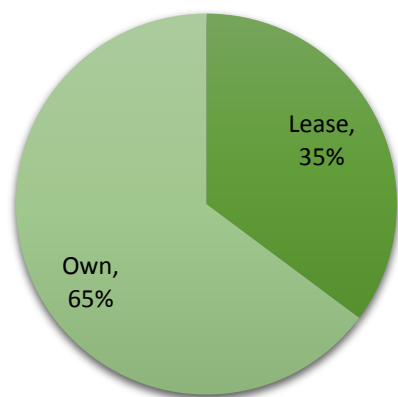


Figure 57: Ownership preference

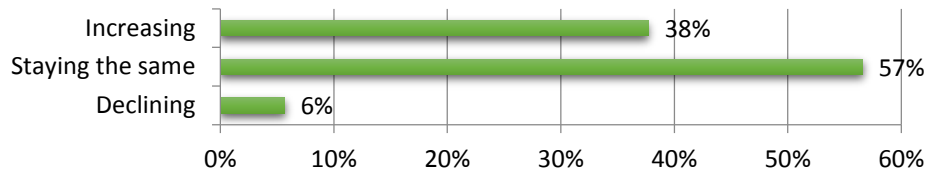
65% of respondents (35 businesses) would prefer to own their facility.

Note: 54 respondents

Investment and Expansion

57% of respondents (30 businesses) indicated that their company's investment in their facility has stayed the same over the past 18 months, while 38% (20 businesses) indicated that the investment has increased. Only three businesses (6%) indicated that investment in their facility has decreased over the same time period.

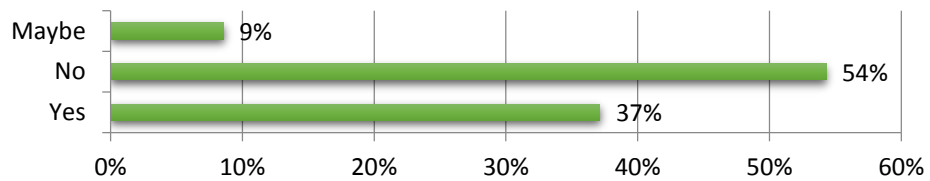
Figure 58: Historical Investment in facility (past 18 months)



Note: 53 respondents

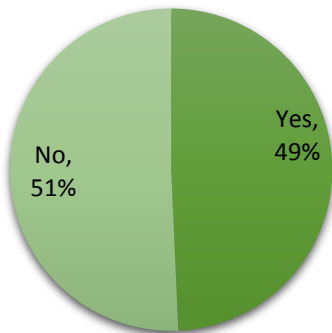
54% of respondents (38 businesses) indicated that there *was not* room for expansion at their site, and 37% (26 businesses) indicated that there *was* room at their site.

Figure 59: Room for expansion



Note: 70 respondents

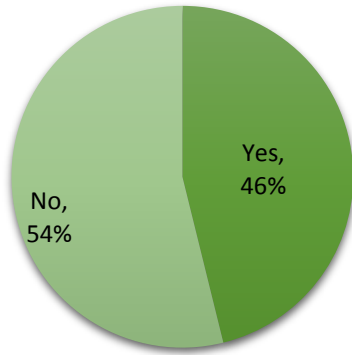
Figure 60: Plans to expand within three years



49% of respondents (35 businesses) plan to expand within three years, however 51% (36 businesses) do not. Additionally, 40% (20 businesses) plan to expand in the next 12 – 18 months.

Note: 71 respondents

Figure 61: Adequacy of current site to support expansion

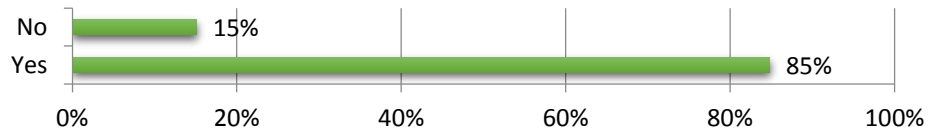


Of the 35 businesses planning expansion within the next three years, 46% (12 businesses) reported that their current site will be adequate. Notably however, 14 businesses (54%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 26 respondents

The vast majority of respondents (85% or 28 businesses) indicated that expansion will occur within the community.

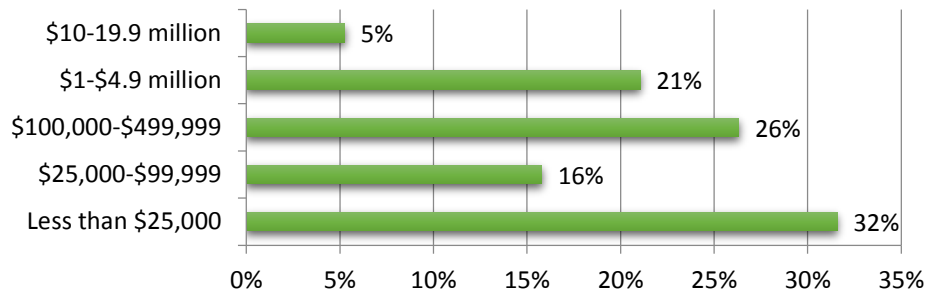
Figure 62: Expansion to occur in community



Note: 33 respondents

The total investment anticipated for the planned expansion plans ranges substantially. 32% (6 businesses) anticipate investing less than \$25,000, and an additional 26% (5 businesses) are planning larger investments in the range of \$100,000 to \$499,999, with 21% (4 businesses) planning investments between \$1 – \$4.9 million.

Figure 63: Estimated expansion investment

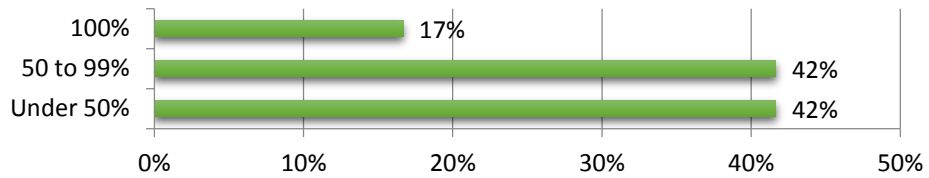


Note: 19 respondents

Of the 35 businesses planning expansion, 42% (5 businesses) responded to state that they expect to spend under 50% of their expansion budget on equipment and technology, while 42% (5

businesses) responded to indicate that 50% - 99% of their expansion budget will be devoted to equipment and technology.

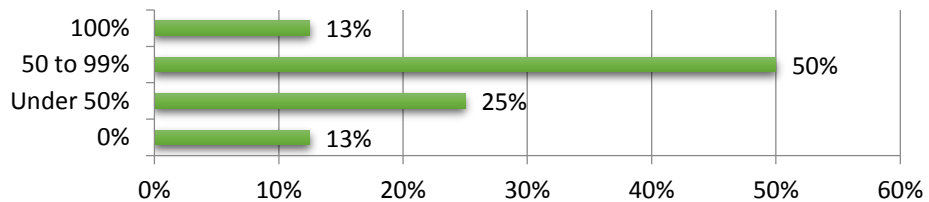
Figure 64: Component of expansion budget for equipment and technology



Note: 12 respondents

4 respondents (50% of businesses) expect to spend 50 - 99% of their expansion budget on real estate, while another 25% (2 businesses) expect to spend under 50%.

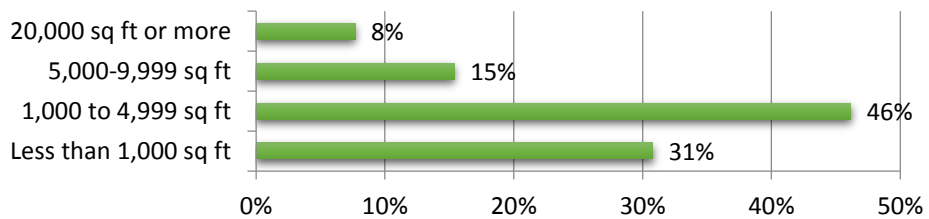
Figure 65: Component of expansion budget for real estate



Note: 8 respondents

46% (6 respondents) of businesses indicated that expansion plans will be between 1,000 and 4,999 square feet. 31% (4 respondents) of businesses anticipated an expansion of less than 1,000 square feet, while just two respondents (15%) expected an expansion of between 5,000 and 9,999 square feet, and 1 respondent (8%) expects an expansion of 20,000 sq.ft or more.

Figure 66: Size of facility expansion



Note: 13 respondents

Facility Upgrades

Figure 67: Recent facility upgrades

59% of businesses (41 businesses) indicated that there had been recent facility upgrades. Of those 41 businesses, 33% (13 businesses) indicated that those upgrades were completed in the last 12 months.

Note: 70 respondents

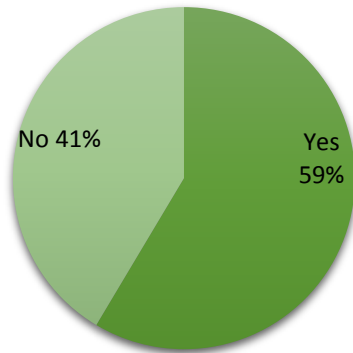
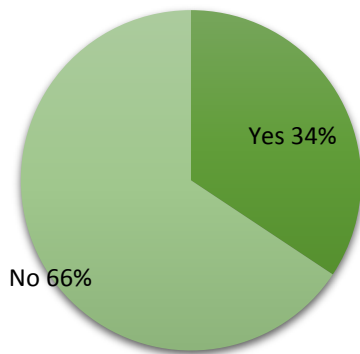


Figure 68: Planning facility upgrades

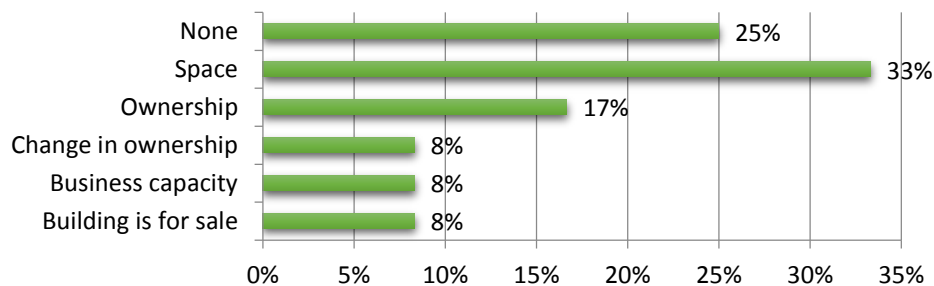
34% (23 businesses) indicated that they are planning facility upgrades, and that the majority (48% or 11 businesses) of those planning upgrades will occur in the next 12 months.

Note: 67 respondents



Respondents were also asked to identify any barriers to upgrading. The most frequently cited barrier was space (33% or 4 businesses). Other factors cited include ownership, change in ownership, business capacity, and the sale of the building.

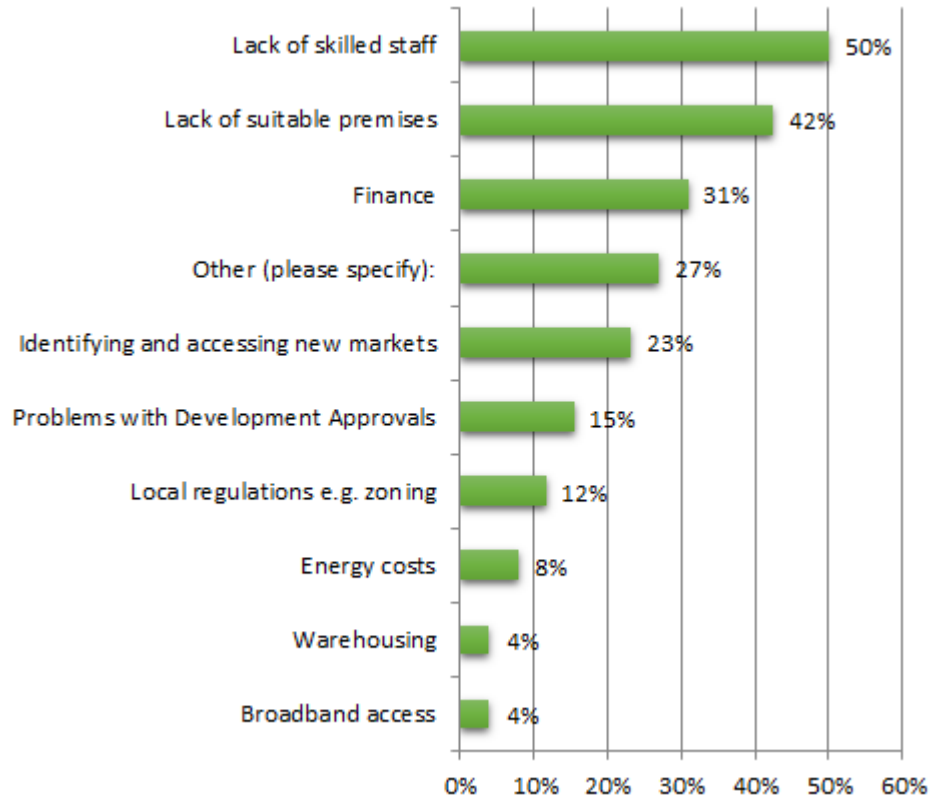
Figure 69: Barriers to upgrading



Note: 12 respondents

Respondents cited a variety of factors that act as constraints to their expansion. The most common of those were lack of skilled staff (50% or 13 businesses), lack of suitable premises (42% or 11 businesses), and finance (31% or 8 businesses).

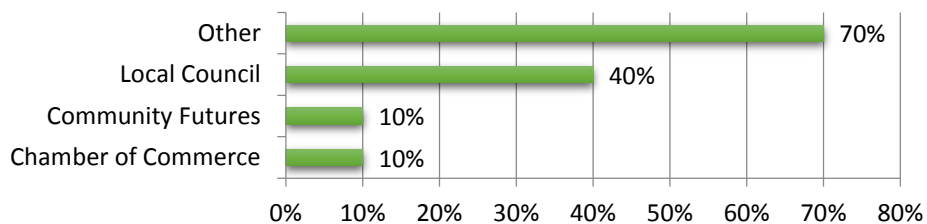
Figure 70: Barriers to expansion



Note: 26 respondents

Just 31% of respondents (10 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 (40% or 4 businesses), Community Futures (10% or 1 businesses), and the local Chamber of Commerce (10% or 1 businesses).

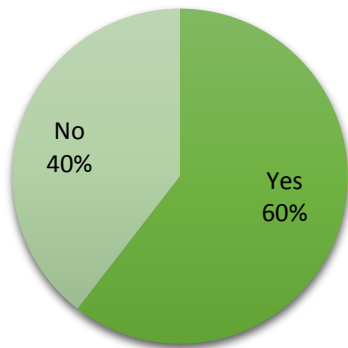
Figure 71: Organizations approached for expansion assistance



Note: 10 respondents

Energy Efficiency

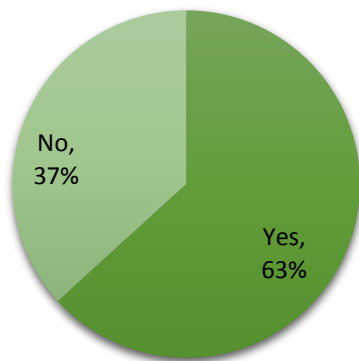
Figure 72: Considering energy efficiency in expansion plans



60% of those who responded (26 businesses) are considering energy efficiency in their expansion plans.

Note: 43 respondents

Figure 73: Awareness of BC Hydro Power Smart



63% of respondents (43 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Note: 68 respondents

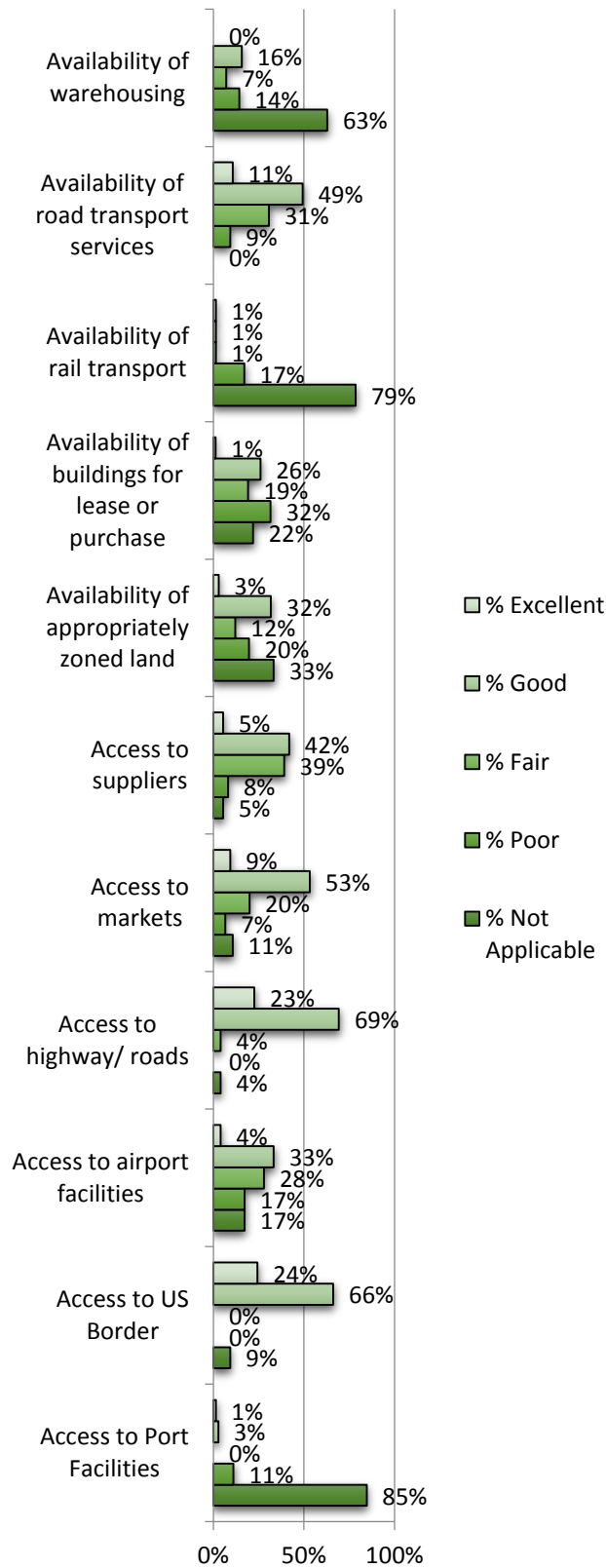
GOVERNMENT SERVICES

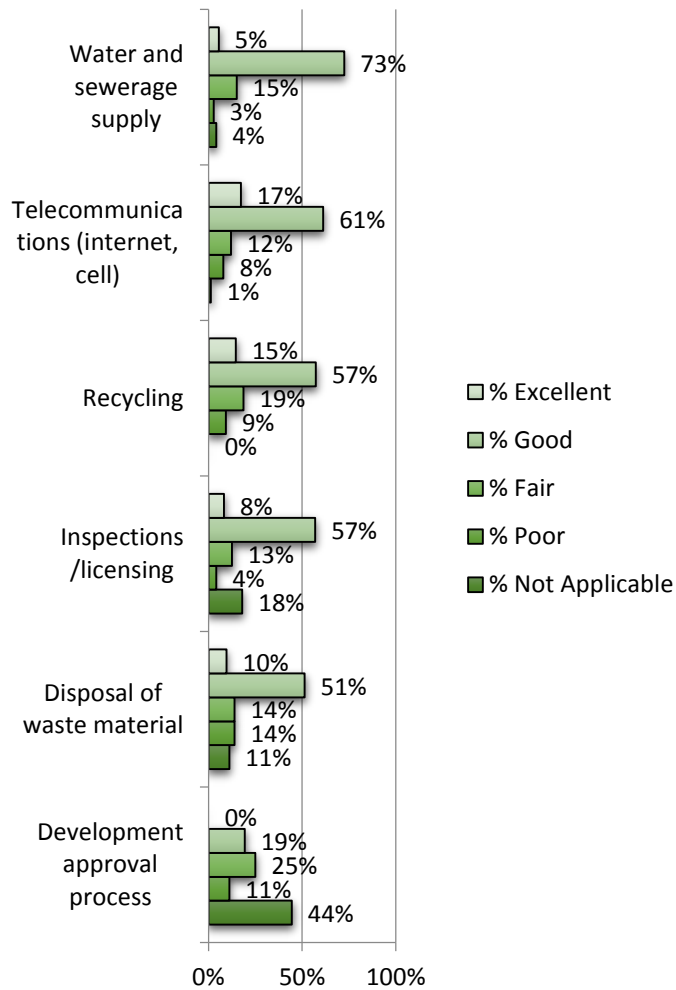
Respondents were asked to rate a list of government services as poor, fair, good, or excellent. Respondents also had the option to rate a service as not applicable to their business.

- The services that received the highest number of **POOR** ratings were availability of buildings for lease or purchase (32% or 23 businesses), availability of appropriately zoned land (20% or 13 businesses), availability of rail transport facilities (17% or 13 businesses), and access to airport facilities (17% or 13 businesses).
- The services that received the highest number of **FAIR** ratings were access to suppliers (39% or 29 businesses), availability of road transport services (31% or 23 businesses), and access to airport facilities (28% or 21 businesses).
- The services that received the highest number of **GOOD** ratings were water and sewerage supply (73% or 53 businesses), access to highway/roads (69% or 52 businesses), and access to US border (66% or 49 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to US border (24% or 18 businesses), access to highway/roads (23% or 17 businesses), and telecommunications (17% or 13 businesses).

- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (85% or 61 businesses), availability of rail transport, (79% or 55 businesses) and the availability of warehousing (63% or 44 businesses).

Figure 74: 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, 56% respondents (31 businesses) indicated they had suggestions. The highest number of responses (17% or 5 businesses) discussed changes to land use/zoning, along with improvements to recycling and waste management (13% or 4 businesses).

Figure 75: Key words and responses in respondents' suggestions for improvements to government services



“Make recycling program more like Banff.”

“Government having the staff do their job (Planning and building inspection seems understaffed).”

“Incentives on commercial real estate development.”

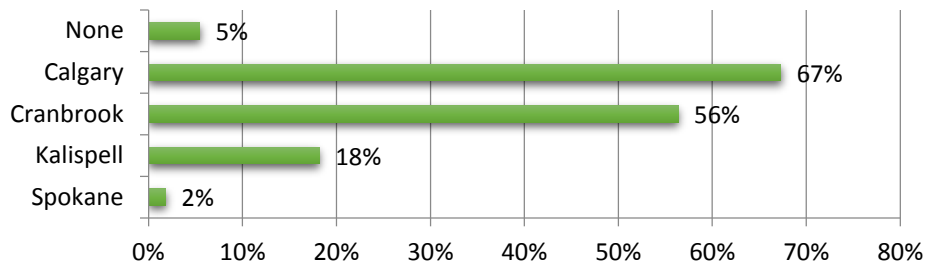
“City to sort out more building zoning space. Find more inventory of bldgs capable of facilitating retail and practitioner/rehabilitation space.”

Purchasing a building is prohibitive because of all the upgrades required with ownership change.”

Airport Service

The Calgary International Airport is the most used airport, with 67% of respondents (37 businesses) indicating they use that airport. The Canadian Rockies International Airport (Cranbrook) was the second most used with 56% (31 businesses).

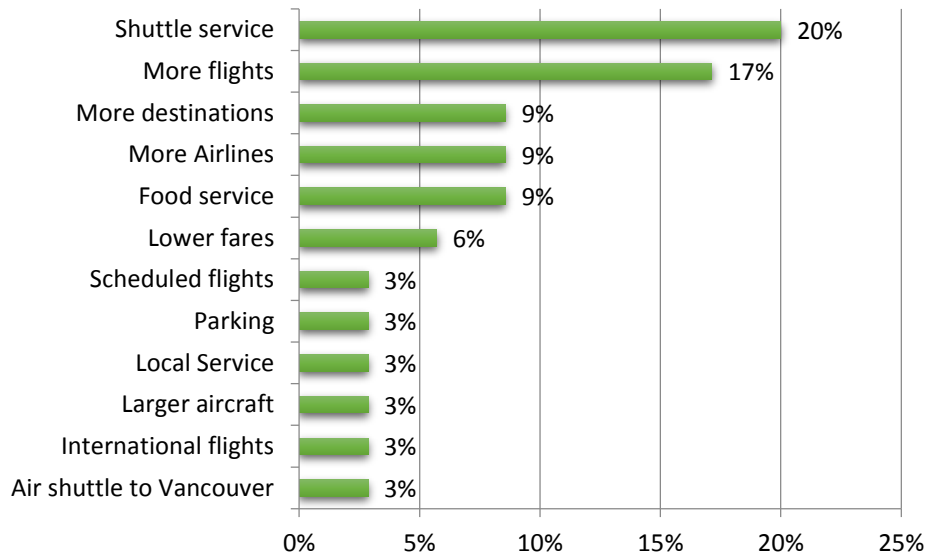
Figure 76: Airport service used



Note: 55 respondents

Respondents indicated that they would most like a shuttle service (20% or 7 businesses) and more flights (17% or 6 businesses).

Figure 77: New services at local airport



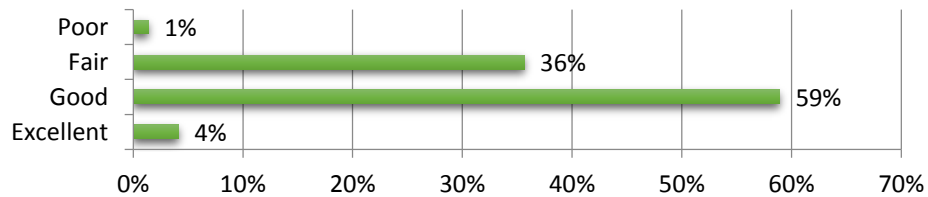
Note: 35 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as good (59% or 43 businesses).

Figure 78: Rating of local business climate



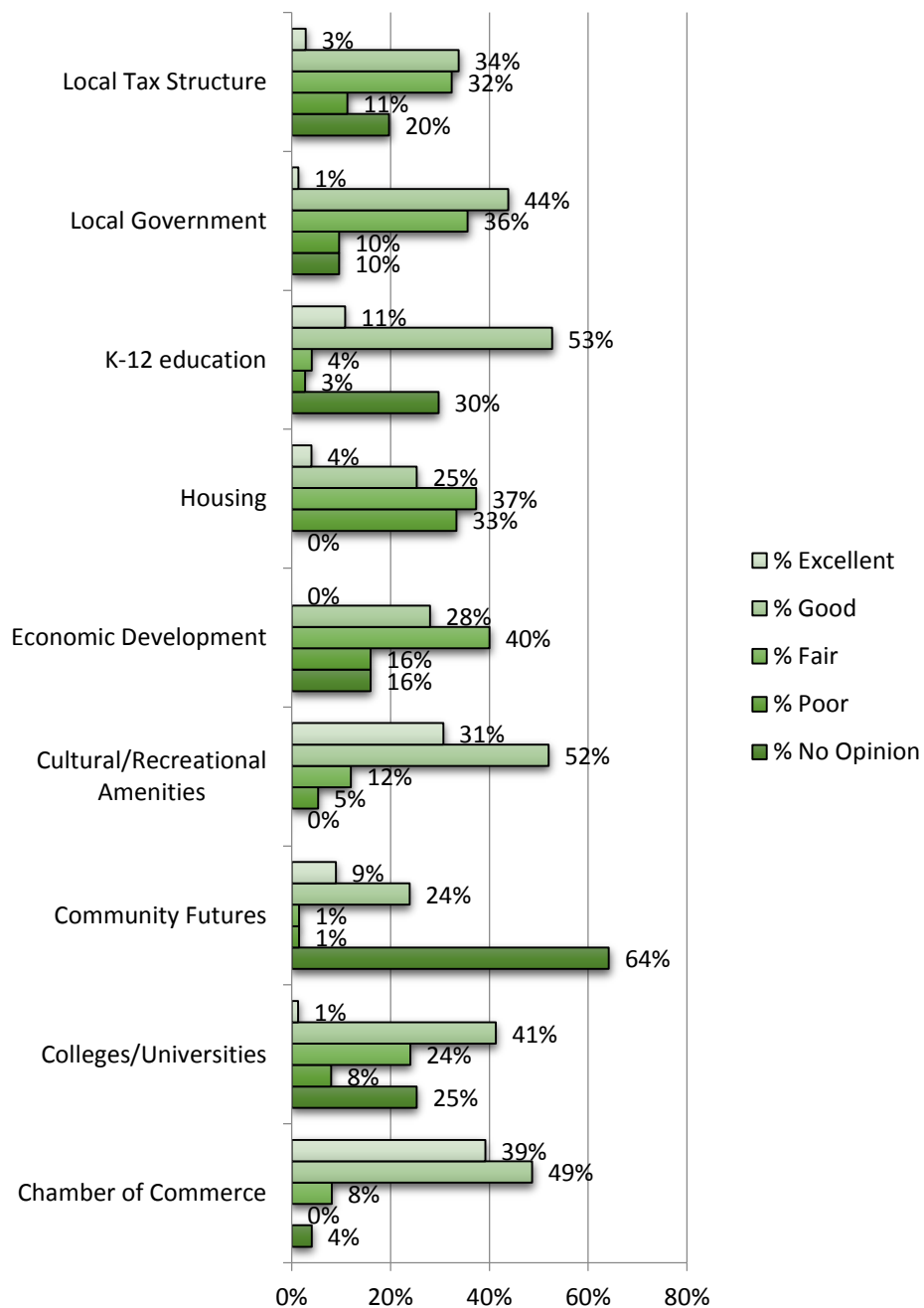
Note: 73 respondents

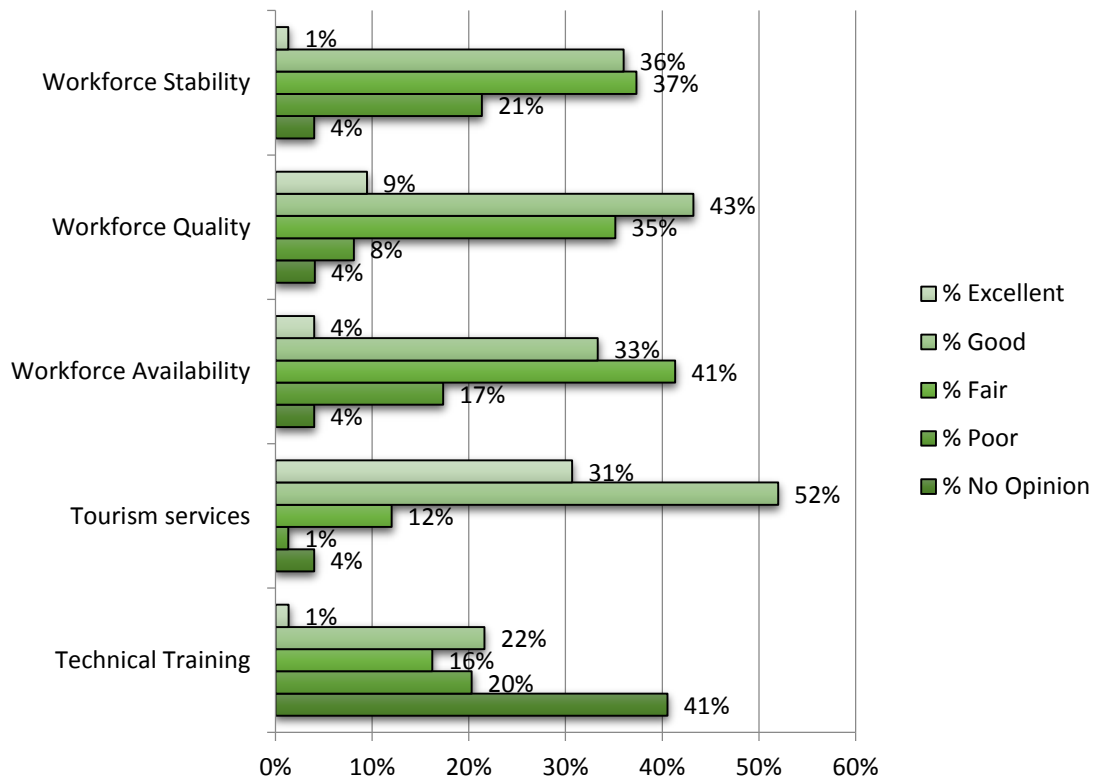
Respondents rated the quality of a list of specific business climate factors as either poor, fair, good, excellent, or not applicable to their business.

- The factors that received the highest number of **POOR** ratings included housing (33% or 25 businesses), technical training (20% or 15 businesses), and workforce availability (21% or 16 businesses).
- The factors that received the highest number of **FAIR** ratings included workforce availability (41% or 31 businesses), economic development (40% or 30 businesses), housing (37% or 28 businesses), and workforce stability (37% or 28 businesses).

- The factors that received the highest number of **GOOD** ratings included K-12 education (53% or 39 businesses), tourism services (52% or 39 businesses), and cultural/recreational amenities (52% or 39 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included chamber of commerce (39% or 29 businesses), cultural and recreational amenities (31% or 23 businesses), and tourism services (31% or 23 businesses).
- The factors that received the highest number of **NO OPINION** ratings include Community Futures (64% or 43 businesses) and Technical Training (41% or 30 businesses).

Figure 79: Rating of business climate factors

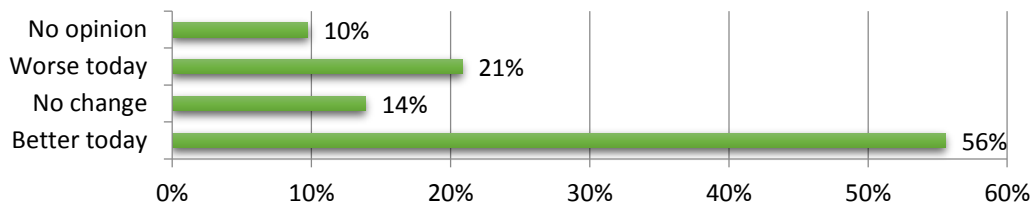




Note: # of respondents varies

56% of respondents (40 businesses) felt that the business climate is better today than it was 5 years ago. 21% (15 businesses) thought that it is worse, and 14% (10 businesses) believed there was no change in the business climate. The main reasons given from those who believe the business climate is worse is the declining economy (40% or 6 respondents) and declining market (40% or 6 respondents).

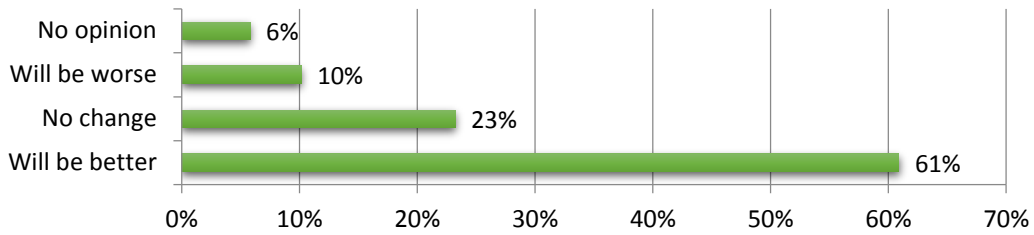
Figure 80: Business climate today vs. 5 years ago



Note: 72 respondents

61% of respondents (42 businesses) expect that the business climate will be better 5 years from today. 10% (7 businesses) expect that it will be worse.

Figure 81: Business climate 5 years from today

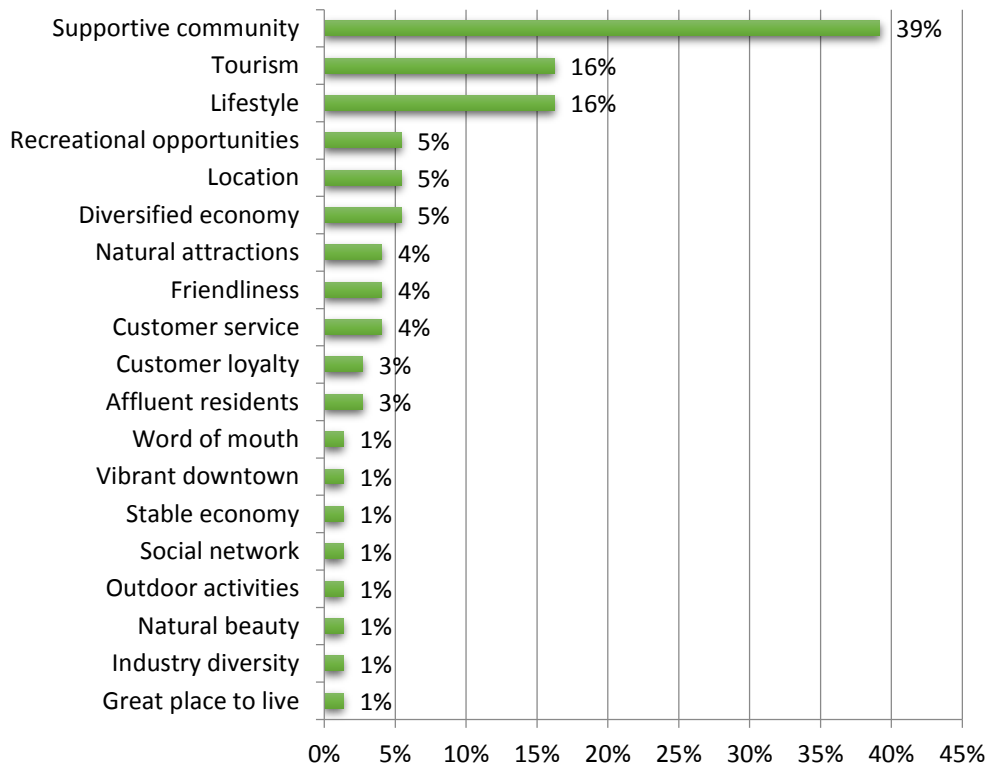


Note: 69 respondents

Strengths and Weaknesses of Business Climate

86 responses were provided when respondents were asked to list the community’s strengths as a place to do business, the highest number of responses (39% or 29 responses) cited the supportive community as the community’s primary strength. 16% (12 businesses) indicated the tourism and 16% (12 businesses) indicated the lifestyle.

Figure 82: Community’s strengths as a place to do business

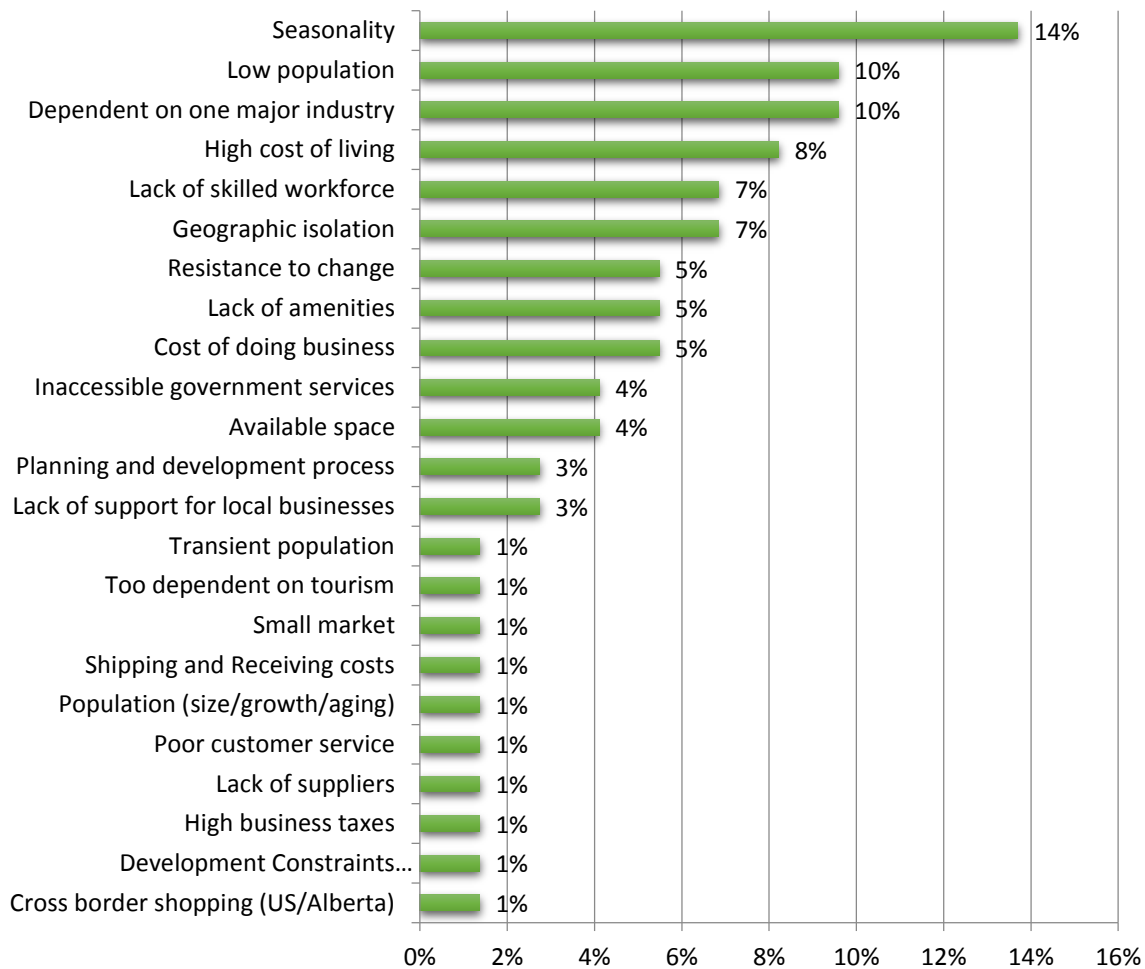


Note: 74 respondents

Respondents were asked to list the community’s weaknesses as a place to do business. The highest number of responses (14% or 10 respondents) was received for the seasonality of the

community. The low population was cited by 10% of respondents (7 businesses) as was the dependency on one major industry.

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

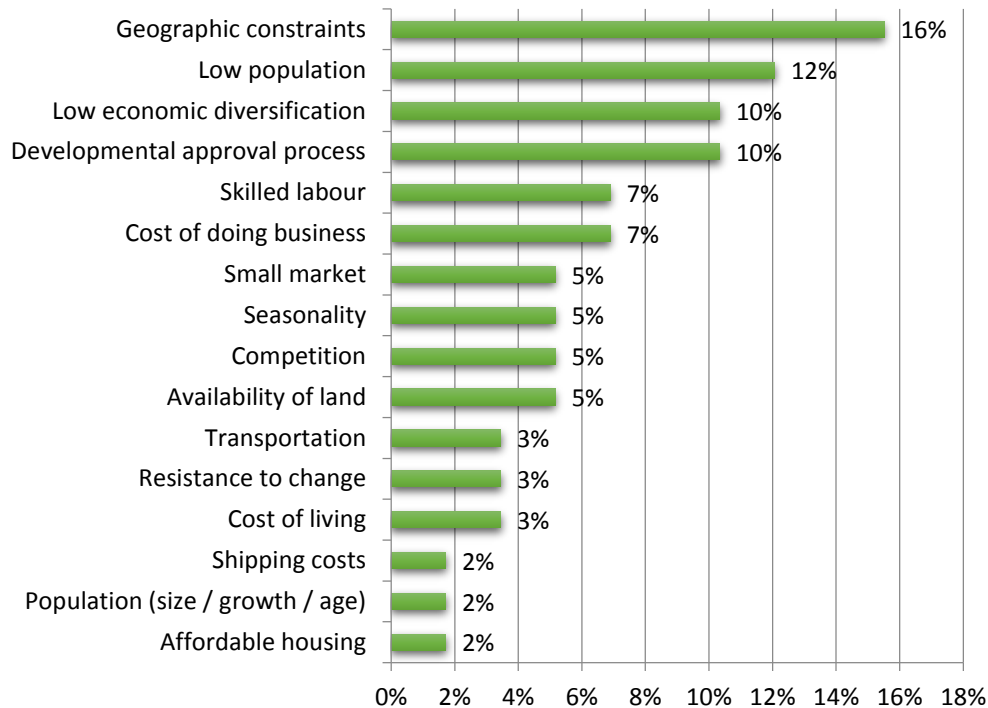


Note: 73 respondents

Business Growth

79% of respondents (58 businesses) indicated that there are barriers to growth. The highest number of respondents (16% or 9 businesses) stated that the geographic constraint is an important barrier to growing the community's economy. Other commonly cited barriers include the low population (12% or 7 businesses), low economic diversification (10% or 6 businesses), and the development approval process (10% or 6 businesses).

Figure 84: Barriers to growth in the community



Note: 58 respondents

The following excerpts illustrate the barriers cited:

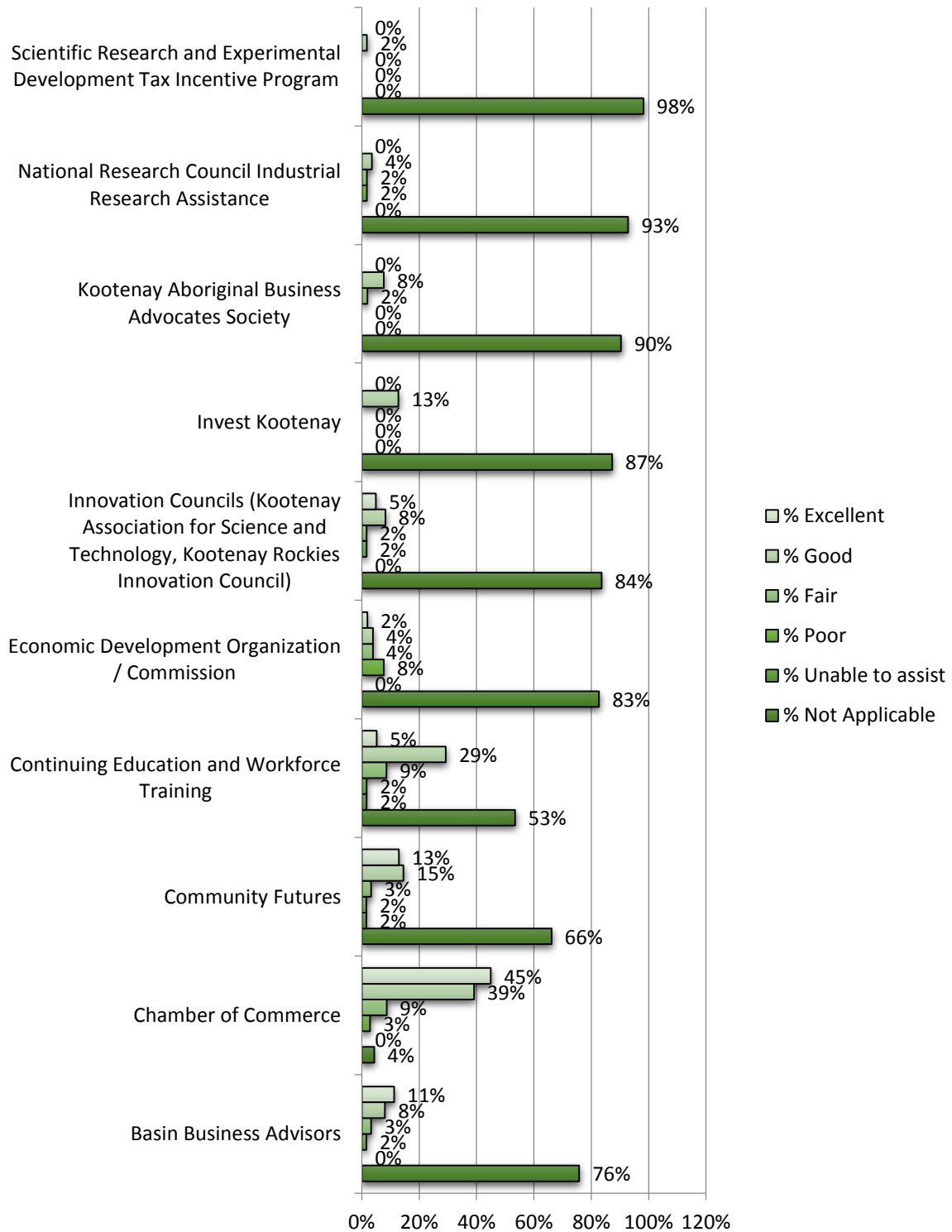
“Population - limited number of year-round habitants.”

“Space, land availability, suitable land.”

“Cost of real estate, lack of affordable housing, reliance on Alberta money.”

Respondents were asked about the level of support they received from various business support providers. The Economic Development Organisation/Commission the highest Poor response (8% or 4 businesses). The Chamber of Commerce was cited as providing an excellent level of service by 45% of respondents (31 businesses) and a good level of service by 39% of respondents (27 businesses). Respondents found the Community Futures (2% or 1 business) and Continuing Education and Workforce Training (2% or 1 businesses) as most commonly unable to assist.

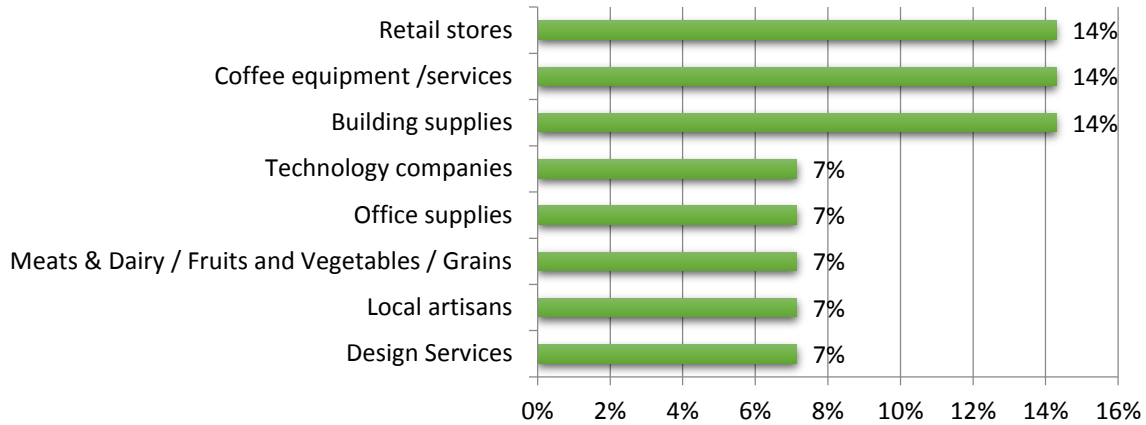
Figure 85: Level of service from business support providers



Note: # of respondents varies

32% of respondents (23 businesses) indicated that there are suppliers that could locate in the region. Retail stores, Coffee equipment/services, and building supplies was most commonly cited by 14% of respondents (2 businesses).

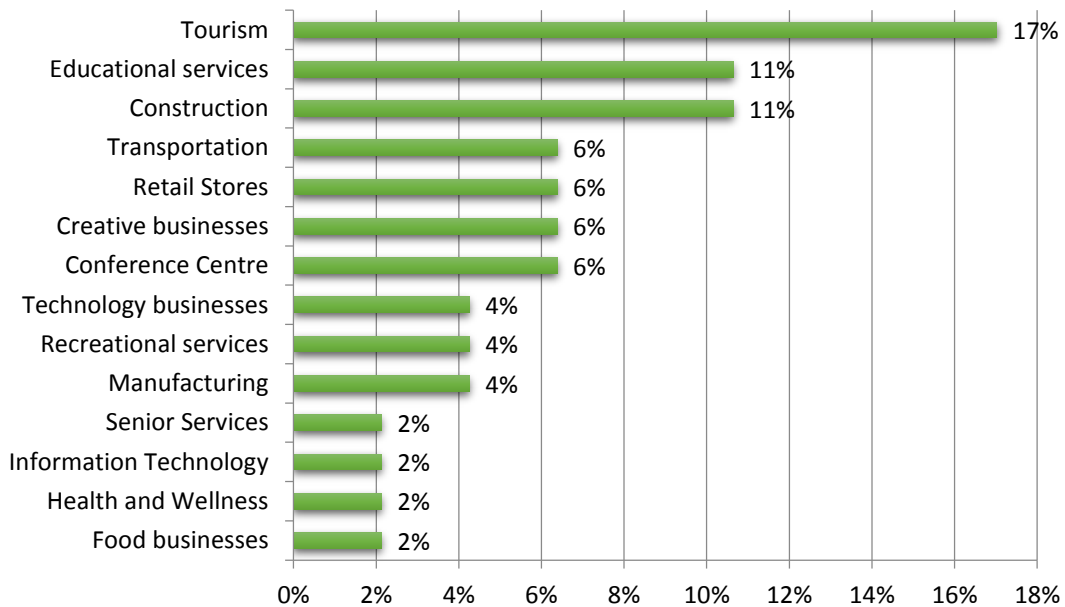
Figure 86: Potential Suppliers



Note: 14 respondents

When asked what business, sector, or industry could be attracted to most strategically benefit the industry, the most common response was tourism (17% or 8 respondents), educational services (11% or 5 businesses), and construction (11% or 5 businesses).

Figure 87: Sectors, businesses or industries that could be attracted to region

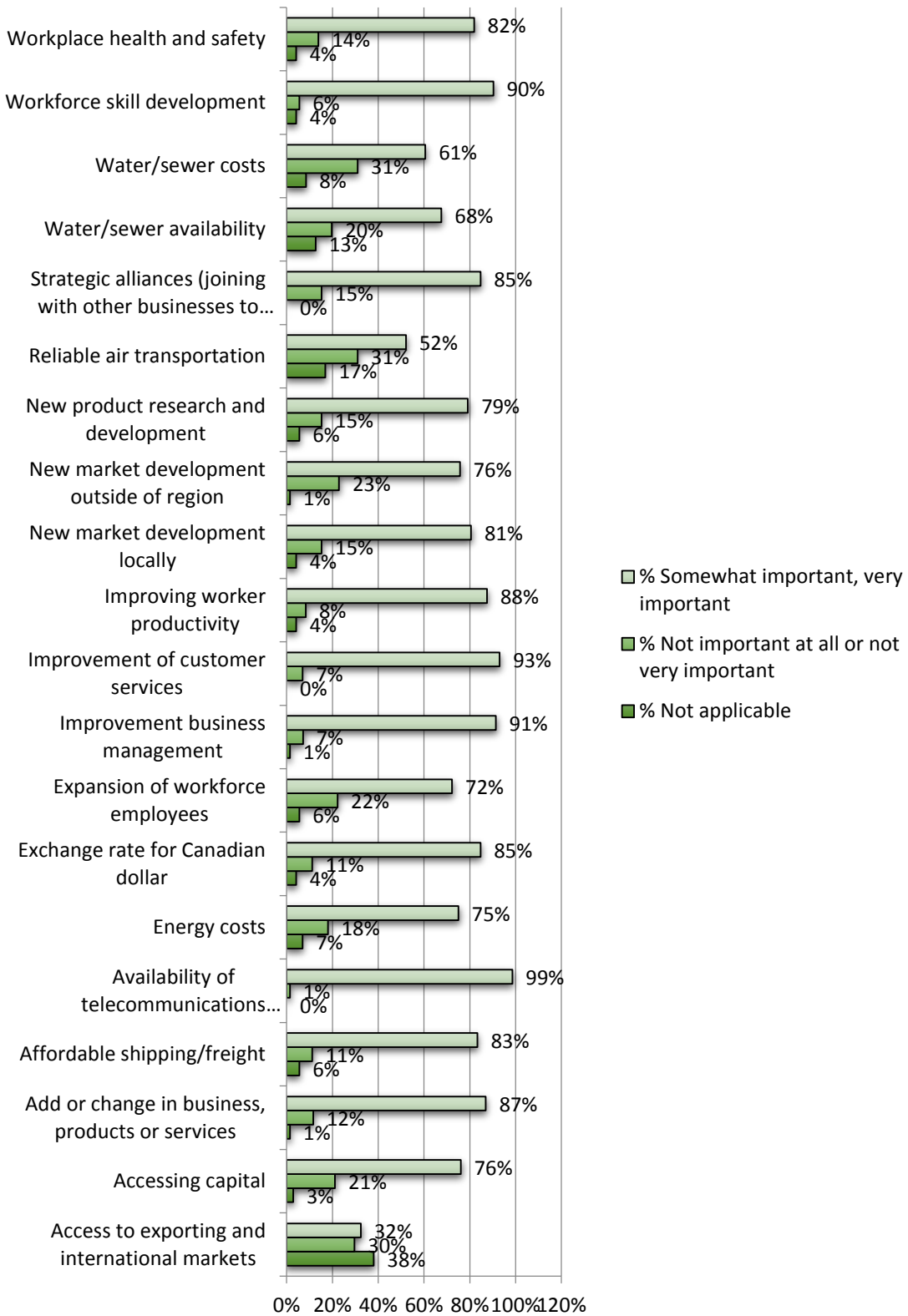


Note: 47 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include availability of telecommunications infrastructure and services (99% or 70 businesses) and improvement of customer service (93% or 67 businesses).

Figure 88: Importance of business competitiveness factors

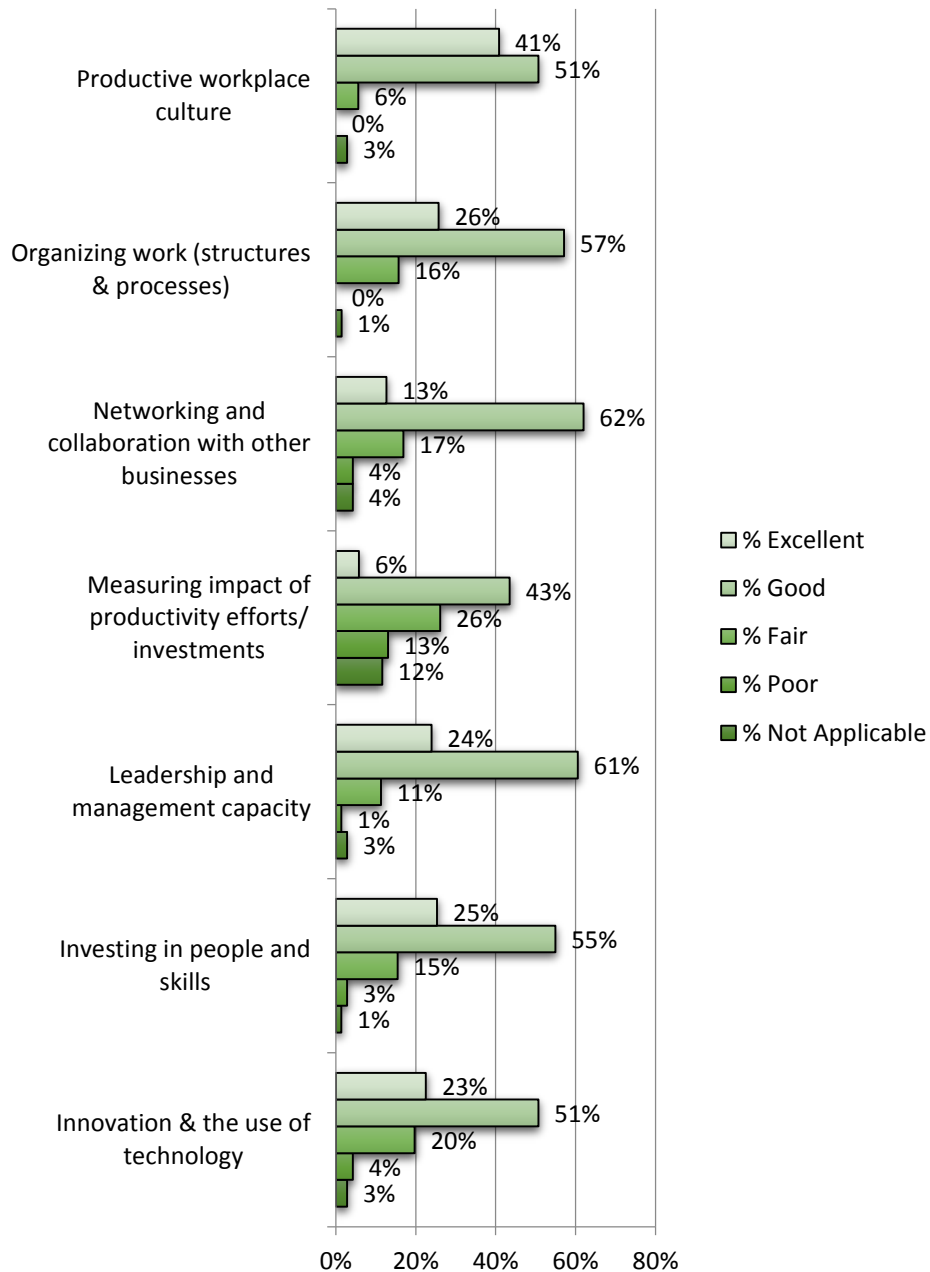


Note: # of respondents varies

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

- **EXCELLENT** ratings include productive workplace culture (41% or 29 businesses) and organising work (structures and processes) (26% or 18 businesses);
- **GOOD** ratings include networking and collaboration with other businesses (62% or 44 businesses), leadership and management (61% or 43 businesses), and organising work (structures and processes) (57% or 40 businesses);
- **FAIR** ratings measuring impact of productivity efforts/investments (26% or 18 businesses);
- **POOR** ratings include measuring impact of productivity efforts/investments (13% or 9 businesses).

Figure 89: Performance on key productivity drivers

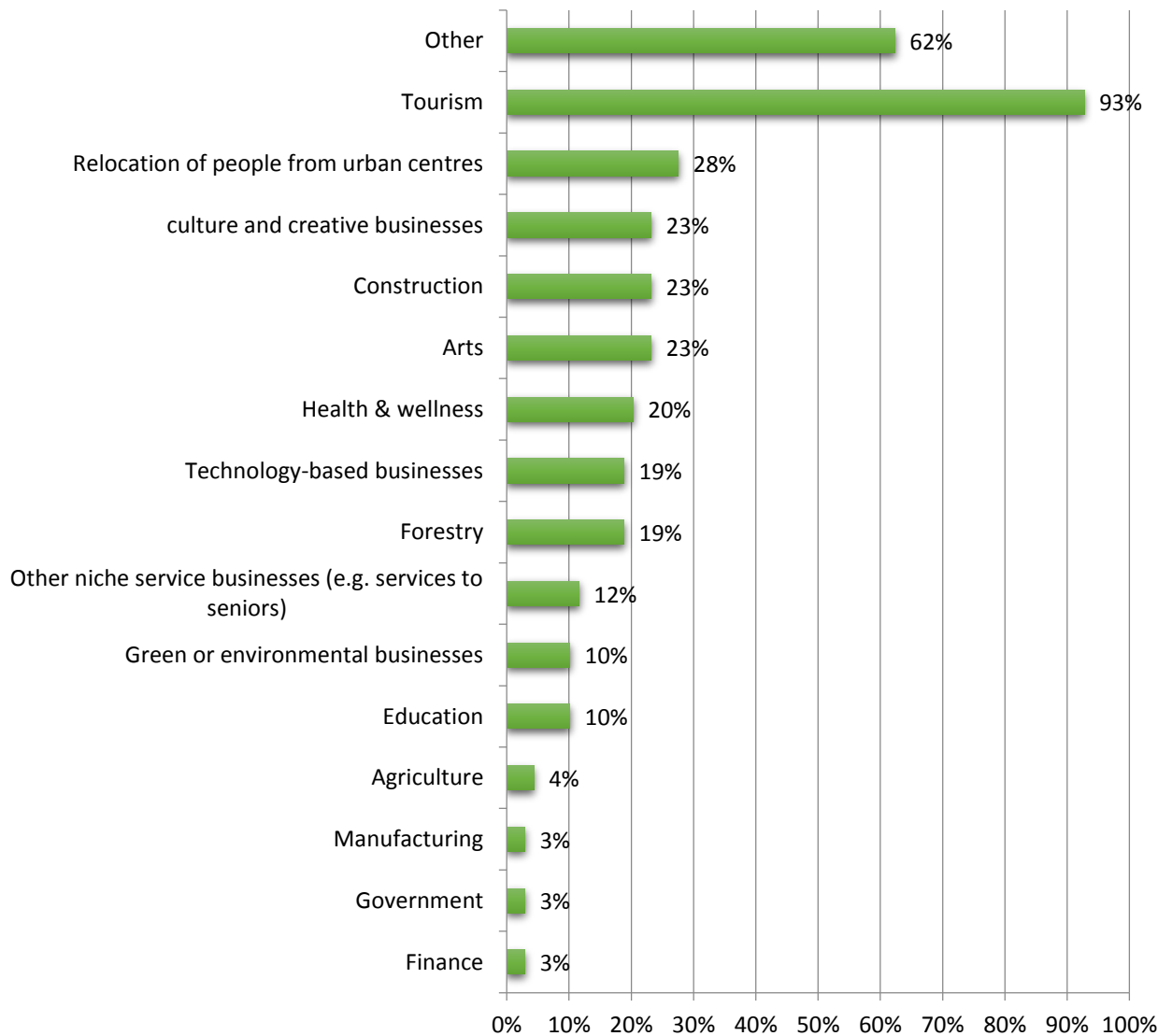


Note: # of respondents varies

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (93% or 64 businesses), relocation of people from urban centres (28% or 19 businesses), culture and creative businesses (23% or 16 businesses), construction businesses (23% or 16 businesses), and arts (23% or 16 businesses). For a list of drivers identified as “other”, refer to Appendix A.

Figure 90: Economic drivers with greatest growth potential

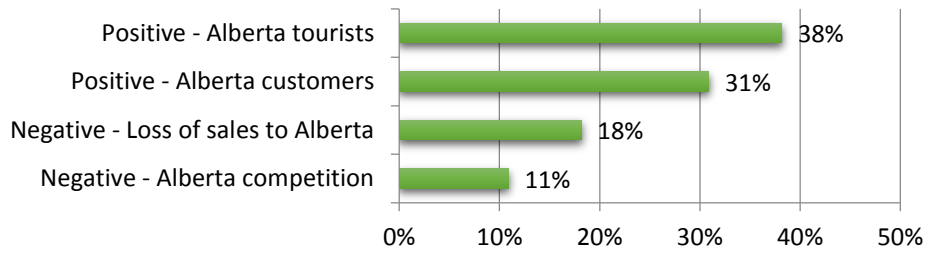


Note: 69 respondents

Proximity to Alberta

57 respondents (86%) reported that they were impacted by their proximity to Alberta. The positive impact of Alberta tourists was the most significantly noted by 38% of respondents (21 businesses), while 31% (17 businesses) indicated a similar positive impact of customers from Alberta.

Figure 91: Impact of Proximity to Alberta



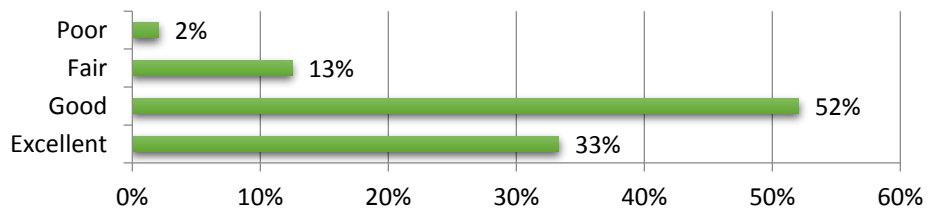
Note: 55 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (52% or 25 businesses), 33% (16 businesses) reported that their facility's health is excellent, and 13% (6 business) reported that it is fair. 2% (1 business) of respondents indicated that their company is in poor health.

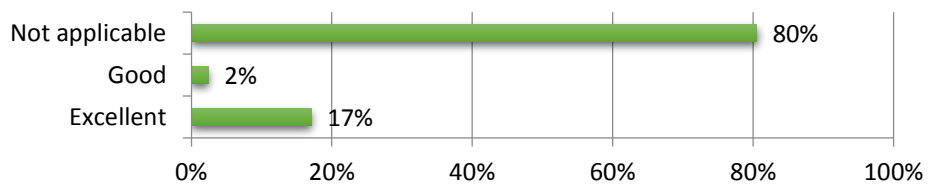
Figure 92: Facility's overall health



Note: 48 respondents

Most businesses with a parent company indicated that the health of that parent company is excellent (17% or 7 businesses).

Figure 93: Overall health of parent company

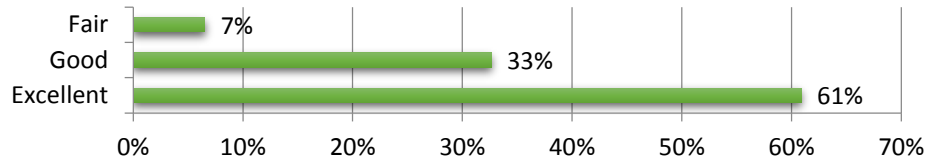


Note: 41 respondents

Attitude toward Community

61% of respondents (28 businesses) indicated that their local management's attitude toward the community is excellent and 33% (15 businesses) indicated that it is good.

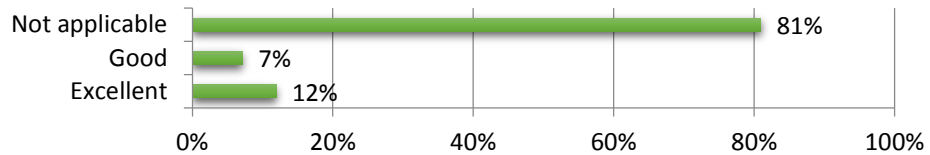
Figure 94: Local management's attitude toward community



Note: 46 respondents

Respondents indicated that their parent company's attitude toward the local community is either excellent (12% or 5 businesses) or good (7% or 3 businesses).

Figure 95: Parent company's attitude toward local community

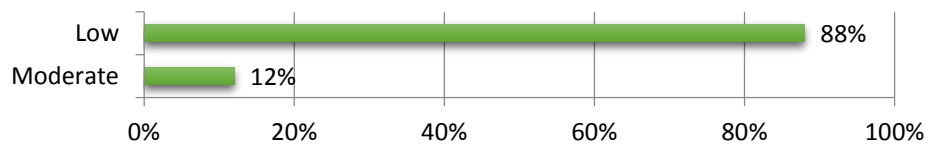


Note: 42 respondents

Risk of Closing or Downsizing

Data indicates that the risk of Fernie businesses closing is low. None of the respondents reported that they are at a high risk of closing in the next 1-3 years, and just 12% (6 businesses) indicated they were at a moderate risk.

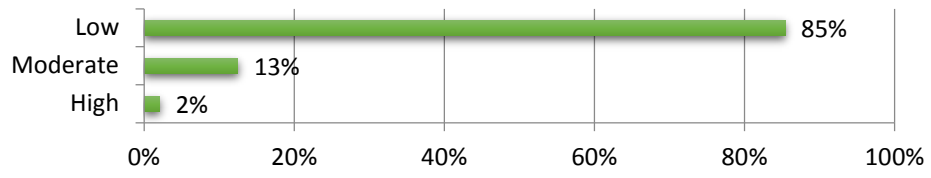
Figure 96: Risk of facility closing



Note: 50 respondents

Similarly, the data indicates that the risk of downsizing is low, with just 2% (1 business) indicating that the risk is high.

Figure 97: Risk of facility downsizing



Note: 48 respondents

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by economic development organizations in the City of Fernie 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

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

The businesses interviewed reported a total of 1,072 employees. The majority (51%) of employees are full-time, followed by 27% part-time employees. 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 38% indicating that the number has increased.

Expected employment trends are also stable with the majority of businesses expecting the number of casual, part time, and full time employees to stay the same. The majority of businesses (88%) recruit locally. 38% of businesses indicate that they currently face recruitment challenges, 55% anticipate future difficulties, and 63% of businesses stated they believe there are strategies that could be undertaken to address employee recruitment.

Additionally, 50% of respondents noted that the lack of skilled staff was posing a barrier to expansion plans. Respondents most commonly rely on advertising when recruiting, followed by word of mouth, the use of recruiting firms, raised wages, job fairs, the internet, and the Canada Job Bank. Actions that could prove helpful include: improved job advertising, assistance with the temporary foreign worker program, and supporting affordable housing.

The hospitality and food/beverage service industries featured in areas of future recruitment challenges, as did the area of administrative/clerical. Targeted actions that focus on the employment that supports the tourism sector could be considered. Related to recruitment and retention, are the critical considerations for employees identified which include the cost of living, housing, and childcare.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority, with just 8% of essential employees under the age of 25. Increasing youth employment may assist in addressing the recruitment challenges that 38% of businesses report having. Actions on this theme could involve gaining a better understanding of the reasons for the low rate of employed youth considered essential, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting businesses with local schools and post-secondary institutions.

Business Growth & Expansion

60% of businesses in the region report being in a growth cycle and 36% are maturing, and the majority of businesses are anticipating low to moderate sales growth over the next year, with 43% expecting moderate sales growth between 1 – 9% and 34% expecting 10-24% sales growth.

The vast majority of businesses (71%) indicate that the majority of their sales are to local markets, indicating there may be an opportunity to expand into surrounding markets. 49% indicate that

they are planning to expand within the next three years. Less than half (46%) of those businesses planning to expand feel their existing site is adequate, and 85% indicated that expansion would occur within the community.

Businesses also report that employment rates are stable, and that they anticipate continued stability over the next three years. This data coupled with the general positive business climate and the optimism for the future provides a positive, stable report on local business conditions. 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 if appropriate, assistance with accessing new markets, exploring financing options, assisting with recruitment activities, and connecting businesses with resources to assist in expansion projects. These potential actions and any others should be designed to address the stated barriers to expansion which include the lack of skilled staff, the lack of suitable premises and financing.

It is worth noting that few (31%) businesses sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

Small to Medium Sized and Independent Businesses

The profile of businesses surveyed indicates that businesses tend to be small to medium in sized and independent. The customer base for businesses appears to be diverse, with 44% of businesses indicating that just 1 - 9% of their sales are generated by their top three customers. Tailoring supports and services to small/medium sized, independent businesses that are focused on the service and tourism sectors will benefit businesses in Fernie and area.

Services and supports should consider that 89% of functions provided by a business are 'services'. Actions to support and encourage small and medium sized businesses could include specific training targeted to the needs of small businesses, such as providing shared services such as payroll, human resources, employee recruitment, bookkeeping, etc. Additional actions could include exploring existing supports available from the provincial Small Business BC organisation, Tourism BC, or CBT's Basin Business Advisors Program.

Supply Sourcing and Procurement

The data indicates that 44% of supplies come from within the local region. The most common response (78%) for the reason why supplies are sourced outside of the local area is that they are not available locally.

The ability to source local supplies of meats, dairy, fruits, vegetables, and grains were the most frequently cited by respondents. There is an opportunity to engage in discussions with local area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. Strengthening the link between local food suppliers/producers and local area businesses could also be explored.

A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Training

Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that 52% of businesses *do* have a training budget and 48% indicated that training typically occurs locally. 50% of respondents indicated that the lack of skilled staff was a barrier to their expansion plans. 56% of businesses were aware of new trends, technologies and industry changes that will require new skills. Areas identified for training include sales/marketing skills, business management, customer service, and food safe/first aid/safety.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 12% of respondents indicated that they have a formal succession plan and just over half (51%) have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance, with some tailoring to target small, independent businesses. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future business planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Continued Support for Tourism Sector

The community of Fernie is already invested in the tourism sector with a relatively high percentage (42%) of businesses engaged in tourism related industries (20% in the 'Retail and Wholesale Trade sector and 13% in the 'Accommodation and Food Services' sector, and 9% in the 'Arts, Entertainment and Recreation' sector). An overwhelming 93% of respondents indicated that tourism was the economic driver with the greatest growth potential. Respondents also noted that increasing the number of tourism related businesses, educational services, and construction related businesses would benefit the region. Actions to increase and support the tourism industry could include the continued collaboration between government and local tourism agencies such as Destination British Columbia, Tourism Fernie, the Fernie Chamber of Commerce, and local businesses. With most businesses expressing optimism for an improved business climate over the next five years, there is much positive support and social capital to build on the work already occurring in this area.

Government Services

A recurring theme was the lack of buildings and land available for lease or purchase, with 42% of respondents indicating that the lack of suitable premises was a barrier to expansion, and 17% suggesting that changes to the land/use and zoning would improve the government services available.

With 49% of businesses planning expansions over the next three years, and 54% of those indicating that their site is currently not adequate to support those plans, there is an opportunity for the local government to work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the lack of available land may be addressed through communication strategies between the local government, local businesses, and the community.

Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Agriculture, forestry, fishing and hunting	11	1	1%
Mining, quarrying, and oil and gas extraction	21	1	1%
Construction	23	8	11%
Manufacturing	31-33	4	5%
Retail and Wholesale Trade	41-45	15	20%
Information and Cultural Industries	51	3	4%
Finance and Insurance	52	2	3%
Real Estate and Rental and Leasing	53	2	3%
Professional, Scientific and Technical Services	54	7	9%
Administrative Support, Waste Management and Remediation	56	2	3%
Educational Services	61	4	5%
Health Care and Social Assistance	62	4	5%
Arts, Entertainment and Recreation	71	7	9%
Accommodation and Food Services	72	10	13%
Other Services	81	5	7%
Total		75	100%

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Engineering/RD	4	5%
Distribution	5	7%
Warehousing	5	7%
Manufacturing	10	14%

Headquarters	15	21%
Services	65	89%
Total	104	

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

Figure 3: Who are your competitors?: Where are your competitors located?	Count	Percent of Question Respondents
Outside Canada	2	3%
In Province	4	6%
In Canada	13	20%
In Region	53	80%
Total	72	

Survey Participants: 75
 Question Respondents: 66
 No Response Count: 9
 Response Rate: 88%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Competitive pricing	1	1%
Diversified product / services	1	1%
Experience	1	1%
Lifestyle	1	1%
Natural resources	1	1%
Networking	1	1%
Persistence	1	1%
Pricing	1	1%
Niche market	2	3%
Reputation	2	3%
Established business	3	4%
Hard work	3	4%
Niche product	3	4%
Community support	4	5%
Word of mouth	4	5%
Branding	5	7%

Customer Service	5	7%
Tourism	5	7%
Location	7	10%
Demand for products and services	9	12%
Workforce	9	12%
Quality product / service	12	16%
Total	81	

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

Figure 5: Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Business expansion	1	1%
Established business	1	1%
Experience in the business	1	1%
Hobby turned into a business	1	1%
Connections to the community	4	5%
Already living here	5	7%
Close to family	5	7%
Location	6	8%
Born and raised here	8	11%
Bought an existing business	8	11%
Business opportunity	16	22%
Lifestyle	21	29%
Total	77	

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

Figure 6: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	18	24%
No	56	76%
Total	74	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1
 Response Rate: 99%

Figure 7: Does this company have another location elsewhere?: If Yes, where?	Count	Percent of Question Respondents
Outside Canada	5	29%
Elsewhere in nation	12	71%
In Province	13	76%
Total	30	

Survey Participants: 75
 Question Respondents: 17
 No Response Count: 1
 Parent Question 'Yes' Respondents: 18
 Response Rate: 94%

Figure 8: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	2	3%
Elsewhere in nation	7	9%
In Province	66	88%
Total	75	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 8b: Location of company's headquarters: Province	Count	Percent of Question Respondents
WA	1	1.35%
ON	2	2.70%
AB	5	6.76%
BC	66	89.19%
Total	74	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1
 Response Rate: 99%

Figure 8c: Location of company's headquarters: Nation	Count	Percent of Question Respondents
United Kingdom	1	1.37%
United States	1	1.37%
Canada	71	97.26%
Total	73	

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

Figure 9: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	1	1%
Emerging	2	3%
Growing	44	60%
Maturing	26	36%
Total	73	

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

Figure 10: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	5	7%
1-4 Years	11	15%
5-9 Years	23	31%
10-19 Years	21	28%
>20 Years	15	20%
Total	75	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 11: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	4	6%
Privately owned	68	94%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 11b: What is this company's legal status?	Count	Percent of Question Respondents
Limited liability partnership (LLP)	1	1%
Partnership	4	5%
Non-profit	5	7%
Sole proprietorship	13	17%
Corporation	46	61%
Other	6	8%
Total	75	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 11c: What is this company's legal status?: If <i>Other</i>, please specify	Count	Percent of Question Respondents
Co-operative	1	1.33%
Partnership/Corporation	5	6.67%
Total	6	

Survey Participants:	75
Question Respondents:	6
No Response Count:	0
Parent Question 'Other' Respondents:	6
Parent Question Respondents:	75
Response Rate:	100%

Figure 12: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	12	16%
No	61	84%
Total	73	

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

Figure 12b: If Yes, describe the local impact of the change	Count	Percent of Question Respondents
Neutral	2	20.00%
Positive	8	80.00%
Total	10	

Survey Participants:	75
Question Respondents:	10
No Response Count:	2
Parent Question 'Yes' Respondents:	12
Parent Question Respondents:	73
Response Rate:	83%

Figure 12c: Is an ownership change pending for this facility?	Count	Percent of Question Respondents
Yes	7	9.46%
No	67	90.54%
Total	74	

Survey Participants:	75
Question Respondents:	74
No Response Count:	1
Response Rate:	99%

Figure 13: If Yes what is the anticipated time frame	Count	Percent of Question Respondents
1 year or less	2	33%
2 years	2	33%
3 years or more	2	33%
Total	6	

Survey Participants:	75
Question Respondents:	6
No Response Count:	1
Parent Question 'Yes' Respondents:	7
Parent Question Respondents:	74
Response Rate:	86%

Figure 14: If Yes, how do you intend to exit the business?	Count	Percent of Question Respondents
Sell/transfer to a family member	1	14%
Sell to another company	2	29%
Sell/transfer to a non-family member	2	29%
Other	2	29%
Total	7	

Survey Participants:	75
Question Respondents:	7
No Response Count:	0
Parent Question 'Yes' Respondents:	7
Parent Question Respondents:	74
Response Rate:	100%

Figure 14b: If Yes, how do you intend to exit the business?: If other, please explain	Count	Percent of Question Respondents

Change in partnership	1	14.29%
Merger	1	14.29%
Total	2	

Survey Participants: 75
 Question Respondents: 2
 No Response Count: 0
 Parent Question 'Other' Respondents: 2
 Parent Question Respondents: 7
 Response Rate: 100%

Figure 15: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	6	12%
No	36	73%
Not applicable	7	14%
Total	49	

Survey Participants: 75
 Question Respondents: 49
 No Response Count: 26
 Response Rate: 65%

Figure 15b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	9	16.98%
No	44	83.02%
Total	53	

Survey Participants: 75
 Question Respondents: 53
 No Response Count: 22
 Response Rate: 71%

Figure 15c: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	4	100.00%

Total	4	

Survey Participants: 75
 Question Respondents: 4
 No Response Count: 2
 Parent Question 'Yes' Respondents: 6
 Parent Question Respondents: 49
 Response Rate: 67%

Figure 15d: If Yes, by whom	Count	Percent of Question Respondents
Personal financial planner	1	20.00%
Accountant	2	40.00%
Other	1	20.00%
Total	4	

Survey Participants: 75
 Question Respondents: 5
 No Response Count: 0
 Parent Question 'Yes' Respondents: 4

Figure 15e: If Yes, by whom: If other, please explain	Count	Percent of Question Respondents
In house	1	20.00%
School Board	1	20.00%
Total	2	
Survey Participants:	75	
Question Respondents:	2	
No Response Count:	0	

Parent Question 'Other' Respondents: 2
 Parent Question Respondents: 5
 Response Rate: 100%

Figure 16: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	32	51%
No	31	49%
Total	63	

Survey Participants: 75
 Question Respondents: 63
 No Response Count: 12
 Response Rate: 84%

LOCAL WORKFORCE

Figure 17: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	22	29%
5-9	22	29%
10-19	12	16%
20-49	17	23%
50-99	2	3%
Total	75	
Total employees:	1072	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 18: Nature of Employment	Count	Percent of Question Respondents
Full Time	551	51%
Part Time	290	27%
Temporary	231	22%
Total	1072	

Survey Participants: 75
 Question Respondents: 75
 Response Rate: 100.00%

Figure 18b: Total number of employees at this facility*: Full-time employees	Count	Percent of Question Respondents
Less than 5	37	49.33%
5-9	17	22.67%
10-19	15	20.00%
20-49	6	8.00%

Total	75	
Total full-time employees:	551	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 18c: Total number of employees at this facility*: Part-time employees	Count	Percent of Question Respondents
Less than 5	52	69.33%
5-9	13	17.33%
10-19	8	10.67%
20-49	2	2.67%
Total	75	
Total part-time employees:	290	

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0
 Response Rate: 100%

Figure 18d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	66	88.00%
5-9	4	5.33%
10-19	1	1.33%
20-49	2	2.67%
50-99	2	2.67%

Total 75
 Total temporary employees: 231

Survey Participants: 75
 Question Respondents: 75
 No Response Count: 0

Response Rate: 100%

Figure 19: Historical employment trend	Count	Percent of Question Respondents
Declining	7	9%
Staying the same	39	53%
Increasing	28	38%
Total	74	

Survey Participants: 75
Question Respondents: 74
No Response Count: 1
Response Rate: 99%

Figure 20: How did the number of staff change, if at all, in the last 3 years?: Fulltime	Count	Percent of Question Respondents
Increased	22	31%
Stayed the same	38	54%
Decreased	10	14%
Total	70	

Survey Participants: 75
Question Respondents: 70
No Response Count: 5
Response Rate: 93%

Figure 20b: How did the number of staff change, if at all, in the last 3 years?: Part-time	Count	Percent of Question Respondents
Increased	21	34%
Stayed the same	38	62%
Decreased	2	3%
Total	61	

Survey Participants: 75
Question Respondents: 61
No Response Count: 14
Response Rate: 81%

Figure 20c: How did the number of staff change, if	Count	Percent of Question Respondents
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at all, in the last 3 years?: Casual		
Increased	7	18%
Stayed the same	31	78%
Decreased	2	5%
Total	40	

Survey Participants: 75
 Question Respondents: 40
 No Response Count: 35
 Response Rate: 53%

Figure 21: 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	34	46%
Stayed the same	37	50%
Decreased	3	4%
Total	74	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1
 Response Rate: 99%

Figure 21b: 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	21	32%
Stayed the same	40	61%
Decreased	5	8%
Total	66	

Survey Participants: 75
 Question Respondents: 66
 No Response Count: 9
 Response Rate: 88%

Figure 21c: How do you expect the number of staff to change, if at all	Count	Percent of Question Respondents
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over the next 3 years?: Casual		
Increased	4	10%
Stayed the same	35	88%
Decreased	1	3%
Total	40	

Survey Participants: 75
 Question Respondents: 40
 No Response Count: 35
 Response Rate: 53%

Figure 22: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents
Less than 25	6	8%
26 - 34	26	37%
35 - 49	27	38%
50 or older	12	17%
Total	71	

Survey Participants: 75
 Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 23: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
Lower than	5	8%
Same as	38	60%
Greater than	20	32%
Total	63	

Survey Participants: 75
 Question Respondents: 63
 No Response Count: 12
 Response Rate: 84%

Figure 23b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
\$10-\$12.99	1	1.92%
\$13-\$14.99	3	5.77%

\$15-\$19.99	7	13.46%
\$20-\$29.99	22	42.31%
\$30-49.99	12	23.08%
\$50-\$99	2	3.85%
\$100 or more	5	9.62%
Total	52	

Survey Participants: 75
 Question Respondents: 52
 No Response Count: 23
 Response Rate: 69%

Figure 23c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
\$10-\$12.99	5	11.90%
\$13-\$14.99	9	21.43%
\$15-\$19.99	12	28.57%
\$20-\$29.99	12	28.57%
\$30-49.99	1	2.38%
\$100 or more	3	7.14%
Total	42	

Survey Participants: 75
 Question Respondents: 42
 No Response Count: 33
 Response Rate: 56%

Figure 23d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
\$10-\$12.99	18	47.37%
\$13-\$14.99	7	18.42%
\$15-\$19.99	8	21.05%
\$20-\$29.99	4	10.53%
\$100 or more	1	2.63%
Total	38	

Survey Participants: 75
 Question Respondents: 38
 No Response Count: 37
 Response Rate: 51%

Figure 24: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	46	82%

Decreasing	1	2%
Increasing	9	16%
Total	56	

Survey Participants: 75
 Question Respondents: 56
 No Response Count: 19
 Response Rate: 75%

Figure 25: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents
Internationally	1	1%
Nationally	2	3%
Provincially	5	7%
Locally	61	88%
Total	69	

Survey Participants: 75
 Question Respondents: 69
 No Response Count: 6
 Response Rate: 92%

Figure 26: Recruitment and retention challenges	Count	Percent
Retention challenges	17	24%
Recruitment challenges	28	38%

Figure 26b: Is employee retention a problem?	Count	Percent of Question Respondents
Yes	17	24%
No	54	76%
Total	71	

Survey Participants: 75
 Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 26c: Is the company experiencing recruitment problems with any employee positions or skills?	Count	Percent of Question Respondents

Yes	28	38%
No	45	62%
Total	73	

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

Figure 27: If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.	Count	Percent of Question Respondents
Housing	2	7.41%
Training	2	7.41%
Treating employees well	2	7.41%
Support a positive environment	3	11.11%
Flex Time	4	14.81%
Bonuses	5	18.52%
Fair wages	10	37.04%
Benefits	11	40.74%
None	1	3.70%
Total	40	

Survey Participants: 72
 Question Respondents: 27
 No Response Count: 45
 Response Rate: 38%

Figure 28: If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
Benefits	1	5%
Training	1	5%
Canada Job Bank	2	10%
Internet	2	10%

Job Fairs	2	10%
Raised Wages	2	10%
Recruiting Firms	2	10%
Word of mouth	3	14%
Advertising	6	29%
Total	21	

Survey Participants: 72
 Question Respondents: 21
 No Response Count: 51
 Response Rate: 29%

Figure 29: Is the company experiencing recruitment problems with any employee positions or skills?: If Yes, in which category(s)?	Count	Percent of Question Respondents
Construction/Contractors	1	4%
Maintenance	1	4%
Mechanics	1	4%
Professional/Technical	1	4%
Food/Beverage Service	2	7%
Healthcare Professionals	2	7%
Administrative/Clerical	3	11%
Hospitality Service	3	11%
Other	21	78%
Total	35	
Survey Participants:	75	

Question Respondents: 27
 No Response Count: 1
 Parent Question 'Yes' Respondents: 28
 Parent Question Respondents: 73
 Response Rate: 96%

Figure 29b: Is the company experiencing recruitment problems with any employee	Count	Percent of Question Respondents
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positions or skills?: Other (specify job roles/titles)		
Chefs/Bakers	1	4%
Electricians	1	4%
Engineers	1	4%
Installers	1	4%
Kitchen staff	1	4%
Physicians	1	4%
Plumbers	1	4%
Sales	1	4%
Skilled/Professional	1	4%
Social Media	1	4%
Stylists	1	4%
Managers	2	7%
Marketing	2	7%
Semi-Skilled/Entry Level	8	30%
Total	23	

Survey Participants: 75
 Question Respondents: 22
 No Response Count: 0
 Parent Question 'Other'
 Respondents: 21
 Parent Question
 Respondents: 27

 Response Rate: 100%

Figure 30: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	32	45.07%
No	39	54.93%
Total	71	

Survey Participants: 75
 Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 30b: Do you anticipate future recruiting difficulties i.e. 3-5 year?: If Yes, in what area(s)?	Count	Percent of Question Respondents
Healthcare Professionals	1	3%
Maintenance	1	3%
Mechanics	1	3%
Sales/Service	1	3%
Administrative/Clerical	2	7%
Food/Beverage Service	2	7%
Hospitality Service	3	10%
Other	22	73%
Total	33	

Survey Participants: 75
 Question Respondents: 30
 No Response Count: 2
 Parent Question 'Yes' Respondents: 32
 Parent Question Respondents: 71
 Response Rate: 94%

Figure 30c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)	Count	Percent of Question Respondents
Electricians	1	3.33%
Engineers	1	3.33%
Equipment operators	1	3.33%
General laborer	1	3.33%
Installers	1	3.33%
Lawers	1	3.33%
Marketing	1	3.33%
Plumbers	1	3.33%
Truck drivers	1	3.33%
Editorial staff	2	6.67%
Managers	2	6.67%
Teachers	2	6.67%
Semi-Skilled/Entry Level	6	20.00%
Total	21	

Survey Participants: 75
 Question Respondents: 22
 No Response Count: 0
 Parent Question 'Other' Respondents: 22
 Parent Question Respondents: 30
 Response Rate: 100%

Figure 31: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	18	37%
No	31	63%
Total	49	

Survey Participants: 75
 Question Respondents: 49
 No Response Count: 26
 Response Rate: 65%

Figure 31b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent of Question Respondents
Employee Sharing	1	5.56%
Promote the area	1	5.56%
Provide training and education	1	5.56%
Support affordable housing	2	11.11%
Help with foreign worker program	4	22.22%
Better job advertising	5	27.78%
Total	14	

Survey Participants: 75
 Question Respondents: 18

No Response Count: 0
 Parent Question 'Yes' Respondents: 18
 Parent Question Respondents: 49
 Response Rate: 100%

Figure 32: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	26	41%
Semi-skilled	14	22%
Entry-level	11	17%
Total	51	

Figure 32b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	15	23.44%
25 to 49%	15	23.44%
50 to 74%	14	21.88%
75 to 100%	20	31.25%
Total	64	

Survey Participants: 75
 Question Respondents: 64
 No Response Count: 11
 Response Rate: 85%

Figure 32c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	10	22.22%
25 to 49%	17	37.78%
50 to 74%	10	22.22%
75 to 100%	8	17.78%
Total	45	

Survey Participants: 75
 Question Respondents: 45
 No Response Count: 30
 Response Rate: 60%

Figure 32d: Percent of workforce: Entry-level	Count	Percent of Question Respondents
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less than 25%	14	35.90%
25 to 49%	12	30.77%
50 to 74%	7	17.95%
75 to 100%	6	15.38%
Total	39	

Survey Participants: 75
 Question Respondents: 39
 No Response Count: 36
 Response Rate: 52%

Figure 33: Does the company provide a training budget in order to upgrade employee's skills?	Count	Percent of Question Respondents
Yes	37	52%
No	34	48%
Total	71	

Survey Participants: 75
 Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 33b: Does the company offer in-house training?	Count	Percent of Question Respondents
Yes	57	79%
No	15	21%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 33c: Does the company use Contracted Training?	Count	Percent of Question Respondents
Yes	17	24%
No	54	76%
Total	71	

Survey Participants: 75

Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 34: 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	40	56%
No	32	44%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 35: 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	48	66.67%
No	24	33.33%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 36: 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
Accounting/Bookeeping	1	2%
Ambassador training	1	2%
Athletic therapy	1	2%

Emerging technologies	1	2%
General sales course Dealing with public	1	2%
Grant writing	1	2%
Leadership training	1	2%
Managerial training	1	2%
Project management	1	2%
Team building	1	2%
Technical training	2	5%
Social media	4	9%
Safety/First Aid/Food Safe	5	11%
Customer service	6	14%
Business management	7	16%
Sales/Marketing	9	20%
Total	43	

Survey Participants: 75
 Question Respondents: 44
 No Response Count: 4
 Parent Question 'Yes' Respondents: 48
 Parent Question Respondents: 72
 Response Rate: 92%

Figure 37: What modes of education/training work best for you?	Count	Percent of Question Respondents
Individual coaching	32	50%
Online/ Webinar training	34	53%
Classroom	40	63%
Other	8	13%
Total	114	

Survey Participants: 75
 Question Respondents: 64
 No Response Count: 11
 Response Rate: 85%

Figure 37b: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Peer to Peer	1	1.56%
Trade shows / Conferences	1	1.56%
In-house / Hands on / Workshop	6	9.38%
Total	8	

Survey Participants: 75

Question Respondents: 8

No Response Count: 0

Parent Question 'Other' Respondents: 8

Parent Question Respondents: 64

Response Rate: 100%

Figure 38: When your staff attend training/certification, where do they usually access the training?	Count	Percent of Question Respondents
United States	7	11%
Rest of Canada	15	23%
Regional	19	30%
British Columbia	20	31%
Local	31	48%
Total	92	

Survey Participants: 75

Question Respondents: 64

No Response Count: 11

Response Rate: 85%

Union status	Count	Percent of Question Respondents
Yes	2	2.70%
No	59	79.73%
Not applicable	13	17.57%
Total	74	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1
 Response Rate: 99%

Figure 39: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Transportation	21	30%
Child care	36	51%
Housing	55	77%
Cost of living	65	92%
Other	20	28%
Total	197	

Survey Participants: 72
 Question Respondents: 71
 No Response Count: 1
 Response Rate: 99%

Figure 39b: Please indicate which issues you believe are critical to your employees?: If <i>Other</i>, please list any other issues	Count	Percent of Question Respondents
Benefits	1	1.41%
Education	1	1.41%
Flextime	1	1.41%
Healthcare	1	1.41%
Housing	1	1.41%
Wages	4	5.63%
Total	9	

Survey Participants: 72
 Question Respondents: 20
 No Response Count: 0
 Parent Question 'Other' Respondents: 20
 Parent Question Respondents: 71
 Response Rate: 100%

In general terms, what percent of your workforce lives in the: Community (%)	Count	Percent of Question Respondents
0-24%	1	1.39%
25-49%	2	2.78%
50-74%	3	4.17%
75-100%	66	91.67%
Total	72	

Survey Participants: 72
 Question Respondents: 72
 No Response Count: 0
 Response Rate: 100%

:In general terms, what percent of your workforce lives in the: Region (%) - includes entire Columbia Basin-Boundary region	Count	Percent of Question Respondents
0-24%	10	71.43%
25-49%	2	14.29%
50-74%	1	7.14%
75-100%	1	7.14%
Total	14	

Survey Participants: 72
 Question Respondents: 14
 No Response Count: 58
 Response Rate: 19%

In general terms, what percent of your workforce lives in the: Outside of region (%)	Count	Percent of Question Respondents
0-24%	2	33.33%
25-49%	2	33.33%
50-74%	2	33.33%
Total	6	

Survey Participants: 72
 Question Respondents: 6
 No Response Count: 66
 Response Rate: 8%

SALES

Figure 40: Annual sales at this facility (optional)	Count	Percent of Question Respondents
Under \$25,000	2	6%
\$49,999 to \$25,000	1	3%
\$99,999 to \$50,000	3	8%
499,999 to \$100,000	9	25%
\$999,999 to \$500,000	7	19%
\$4.9 million to 1 million	12	33%
\$9.9 million to 5 million	1	3%
\$19.9 million to 10 million	1	3%
Total	36	
Survey Participants:	75	

Question Respondents: 36
 No Response Count: 39
 Response Rate: 48%

Figure 41: Is the market for your product	Count	Percent of Question Respondents
Stable	37	50%
Decreasing	2	3%
Increasing	35	47%
Total	74	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1
 Response Rate: 99%

Figure 42: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents
Stable	25	42%
Decreasing	6	10%
Increasing	29	48%
Total	60	

Survey Participants: 75
 Question Respondents: 60
 No Response Count: 15
 Response Rate: 80%

Figure 43: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	1	1%
0%	9	13%
1 - 9%	29	43%
10 - 24%	23	34%
25 - 49%	4	6%
Over 100%	1	1%
Total	67	

Survey Participants: 75
 Question Respondents: 67
 No Response Count: 8
 Response Rate: 89%

Figure 44: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	8	11%
Staying the same	23	32%
Increasing	38	53%
Not applicable	3	4%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 44b: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Declining	1	2%
Staying the same	1	2%
Increasing	9	21%
Not applicable	31	74%

Total 42

Survey Participants: 75
 Question Respondents: 42
 No Response Count: 33
 Response Rate: 56%

Figure 44c:: Historical sales trend: Within the industry	Count	Percent of Question Respondents
Declining	10	16%
Staying the same	24	39%
Increasing	20	33%
Not applicable	7	11%
Total	61	

Survey Participants: 75
 Question Respondents: 61
 No Response Count: 14
 Response Rate: 81%

Figure 44d: Historical export sales trend	Count	Percent of Question Respondents
Declining	0	0%
Staying the same	8	17%

Increasing	2	4%
Not applicable	37	79%
Total	47	

Survey Participants: 75
 Question Respondents: 47
 No Response Count: 28
 Response Rate: 63%

Figure 45: Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
1 - 9%	20	44%
10 - 25%	10	22%
26 - 50%	10	22%
51 - 75%	2	4%
76 - 100%	3	7%
Total	45	

Survey Participants: 72
 Question Respondents: 45
 No Response Count: 27
 Response Rate: 62%

Figure 46: Source of Majority of Sales	Count	Percent of Question Respondents
Local	48	71%
Provincial	3	4%
National	8	12%
United States	0	0%
International	0	0%
Total	59	

Figure 46b: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents
1-9%	3	25.00%

10-19%	4	33.33%
20-29%	2	16.67%
30-39%	2	16.67%
40-49%	1	8.33%
Total	12	

Survey Participants: 75
 Question Respondents: 12
 No Response Count: 63
 Response Rate: 16%

Figure 46c: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
10-19%	5	71.43%
20-29%	2	28.57%
Total	7	

Survey Participants: 75
 Question Respondents: 7
 No Response Count: 68
 Response Rate: 9%

Figure 46d: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
1-9%	2	6.45%
10-19%	4	12.90%
20-29%	5	16.13%
30-39%	6	19.35%
40-49%	2	6.45%
50-59%	4	12.90%
60-69%	4	12.90%
70-79%	3	9.68%
80-89%	1	3.23%
Total	31	

Survey Participants: 75
 Question Respondents: 31
 No Response Count: 44

Response Rate: 41%

Figure 46e: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
1-9%	5	25.00%
10-19%	3	15.00%
20-29%	5	25.00%
30-39%	3	15.00%
40-49%	1	5.00%
60-69%	2	10.00%
100%	1	5.00%
Total	20	

Survey Participants: 75
 Question Respondents: 20
 No Response Count: 55
 Response Rate: 27%

Figure 46f: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
1-9%	2	2.94%
10-19%	3	4.41%
20-29%	2	2.94%
30-39%	4	5.88%
40-49%	2	2.94%
50-59%	7	10.29%
60-69%	2	2.94%
70-79%	6	8.82%
80-89%	3	4.41%
90-99%	5	7.35%
100%	32	47.06%
Total	68	

Survey Participants: 75
 Question Respondents: 68
 No Response Count: 7
 Response Rate: 91%

Figure 47: International trade status	Count	Percent of Question Respondents
Import	2	3%
Export	5	8%
None	14	22%
Not applicable	45	70%
Total	66	

Survey Participants: 75
 Question Respondents: 64
 No Response Count: 11
 Response Rate: 85%

Figure 48: Do you engage in government procurement?	Count	Percent of Question Respondents
Yes	15	22%
No	54	78%
Total	69	

Survey Participants: 72
 Question Respondents: 69
 No Response Count: 3
 Response Rate: 96%

Figure 49: Source of Majority of Supplies	Count	Percent of Question Respondents
Local	19	44%
Provincial	12	28%
National	22	51%
United States	4	9%
International	2	5%
Total	59	

Figure 49b: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
1-9%	3	6.98%
10-19%	7	16.28%
20-29%	7	16.28%
30-39%	2	4.65%
40-49%	2	4.65%
50-59%	3	6.98%
60-69%	1	2.33%
70-79%	3	6.98%
80-89%	1	2.33%
90-99%	3	6.98%
100%	11	25.58%
Total	43	

Survey Participants: 75
 Question Respondents: 43
 No Response Count: 32
 Response Rate: 57%

Figure 49c: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
1-9%	2	8.33%
10-19%	1	4.17%
20-29%	4	16.67%
30-39%	2	8.33%
40-49%	1	4.17%
50-59%	2	8.33%
60-69%	2	8.33%
70-79%	4	16.67%
80-89%	3	12.50%
90-99%	1	4.17%
100%	2	8.33%
Total	24	

Survey Participants: 75
 Question Respondents: 24

No Response Count: 51
 Response Rate: 32%

Figure 49d: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
1-9%	4	9.09%
10-19%	3	6.82%
20-29%	8	18.18%
30-39%	2	4.55%
40-49%	2	4.55%
50-59%	4	9.09%
60-69%	1	2.27%
70-79%	4	9.09%
80-89%	2	4.55%
90-99%	8	18.18%
100%	6	13.64%
Total	44	

Survey Participants: 75
 Question Respondents: 44
 No Response Count: 31
 Response Rate: 59%

Figure 49e: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
1-9%	2	13.33%
10-19%	4	26.67%
20-29%	1	6.67%
30-39%	2	13.33%
50-59%	2	13.33%
60-69%	1	6.67%
70-79%	1	6.67%
90-99%	1	6.67%
100%	1	6.67%
Total	15	

Survey Participants: 75

Question Respondents: 15
 No Response Count: 60
 Response Rate: 20%

Figure 49f: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
1-9%	3	37.50%
10-19%	1	12.50%
20-29%	1	12.50%
30-39%	1	12.50%
80-89%	1	12.50%
100%	1	12.50%
Total	8	

Survey Participants: 75
 Question Respondents: 8
 No Response Count: 67
 Response Rate: 11%

Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	50	68%
No	23	32%
Total	73	

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

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
Computers / Software	1	3.85%
Construction supplies	1	3.85%
Hair salon supplies	1	3.85%

Professional services	1	3.85%
Shipping Services	1	3.85%
Technology Services	1	3.85%
Chemicals	2	7.69%
Graphic design services	2	7.69%
Laundry services	2	7.69%
Office supplies	2	7.69%
Meats & Dairy / Fruits and Vegetables / Grains	3	11.54%
Total	17	

Survey Participants: 72
Question Respondents: 26
No Response Count: 46
Response Rate: 36%

Figure 50: 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
No applicable to this business	2	4%
Loyalty to current supplier	4	7%
No control - head office decision	5	9%
Quality of available products	5	9%
Unaware of local vendors	5	9%
Higher costs locally	6	11%
Product not available here	43	78%
Other	6	11%
Total	76	

Survey Participants: 72
Question Respondents: 55
No Response Count: 17
Response Rate: 76%

Figure 50b: 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
Cost	1	1.82%
Franchise restrictions	1	1.82%
Not available here	1	1.82%
Supply shortage	3	5.45%
Total	6	

Survey Participants: 72

Question Respondents: 6

No Response Count: 0

Parent Question 'Other' Respondents: 6

Parent Question Respondents: 55

Response Rate: 100%

FACILITIES AND EQUIPMENT

Figure 51: What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents
less than 1,000 sq ft	18	27%
1,000-4,999 sq ft	31	47%
5,000-9,999 sq ft	5	8%
10,000-19,999 sq ft	4	6%
20,000 sq ft or more	8	12%

Total	66	
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Survey Participants: 75
 Question Respondents: 66
 No Response Count: 9
 Response Rate: 88%

Figure 52:Condition of facility	Count	Percent of Question Respondents
Excellent	26	37%
Good	24	34%
Fair	16	23%
Poor	4	6%
Total	70	

Survey Participants: 75
 Question Respondents: 70
 No Response Count: 5
 Response Rate: 93%

Figure 53: Condition of equipment	Count	Percent of Question Respondents
Excellent	21	31%
Good	40	60%
Fair	5	7%
Poor	1	1%
Total	67	

Survey Participants: 75
 Question Respondents: 67
 No Response Count: 8
 Response Rate: 89%

Figure 54: Status of facility	Count	Percent of Question Respondents
Owned	28	38%
Leased	45	62%
Total	73	

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

Figure 55: Status of facility: If Leased, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	9	39%
1-2 Years	7	30%
3-5 Years	3	13%
>5 Years	4	17%
Total	23	

Survey Participants: 75
 Question Respondents: 23
 No Response Count: 22
 Parent Question 'Leased' Respondents: 45
 Parent Question Respondents: 73

Figure 55b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	34	80.95%
No	8	19.05%
Total	42	

Survey Participants: 75
 Question Respondents: 42
 No Response Count: 3
 Parent Question 'Leased' Respondents: 45
 Parent Question Respondents: 73
 Response Rate: 93%

Figure 56: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	19	35%
Own	35	65%
Total	54	

Survey Participants: 75
 Question Respondents: 54
 No Response Count: 21
 Response Rate: 72%

Figure 57: Historical investment trends: Over past 18 months in the <i>facility</i>	Count	Percent of Question Respondents
Declining	3	6%
Staying the same	30	57%
Increasing	20	38%
Total	53	

Survey Participants: 75
 Question Respondents: 53
 No Response Count: 22
 Response Rate: 71%

Figure 58: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	26	37%
No	38	54%
Maybe	6	9%
Total	70	

Survey Participants: 75
 Question Respondents: 70
 No Response Count: 5
 Response Rate: 93%

Figure 59: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	35	49%
No	36	51%
Total	71	

Survey Participants: 75
 Question Respondents: 71
 No Response Count: 4
 Response Rate: 95%

Figure 59b: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	20	40.00%
No	30	60.00%
Total	50	

Survey Participants: 75
 Question Respondents: 50
 No Response Count: 25

Response Rate: 67%

Figure 60: 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	12	46%
No	14	54%
Total	26	

Survey Participants: 75

Question Respondents: 26

No Response Count: 9

Parent Question 'Yes' Respondents: 35

Parent Question Respondents: 71

Figure 61: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent of Question Respondents
Yes	28	85%
No	5	15%
Total	33	

Survey Participants: 75

Question Respondents: 33

No Response Count: 2

Parent Question 'Yes' Respondents: 35

Parent Question Respondents: 71

Figure 62: Does the company plan to expand in the next three years?: Estimated total investment	Count	Percent of Question Respondents
Less than \$25,000	6	32%
\$25,000-\$99,999	3	16%
\$100,000-\$499,999	5	26%
\$1-\$4.9 million	4	21%
\$10-19.9 million	1	5%
Total	19	
Survey Participants:	75	

Question Respondents: 19
 No Response Count: 16
 Parent Question 'Yes' Respondents: 35
 Parent Question Respondents: 71
 Response Rate: 54%

Figure 63: Does the company plan to expand in the next three years?: Approximate percentage equipment/technology	Count	Percent of Question Respondents
Under 50%	5	42%
50 to 99%	5	42%
100%	2	17%
Total	12	

Survey Participants: 75
 Question Respondents: 12
 No Response Count: 23
 Parent Question 'Yes' Respondents: 35
 Parent Question Respondents: 71
 Response Rate: 34%

Figure 64: Does the company plan to expand in the next three years?: Approximate percentage real estate	Count	Percent of Question Respondents
0%	1	13%
Under 50%	2	25%
50 to 99%	4	50%
100%	1	13%
Total	8	

Survey Participants: 75
 Question Respondents: 8
 No Response Count: 27
 Parent Question 'Yes' Respondents: 35
 Parent Question Respondents: 71
 Response Rate: 23%

Figure 65: 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	4	31%
1,000 to 4,999 sq ft	6	46%
5,000-9,999 sq ft	2	15%
20,000 sq ft or more	1	8%
Total	13	

Survey Participants: 75
 Question Respondents: 13
 No Response Count: 22
 Parent Question 'Yes' Respondents: 35
 Parent Question Respondents: 71
 Response Rate: 37%

Figure 66: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	41	59%
No	29	41%
Total	70	

Survey Participants: 75
 Question Respondents: 70
 No Response Count: 5
 Response Rate: 93%

Figure 66b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	2	5.00%
6	6	15.00%
12	13	32.50%
18	6	15.00%
24	9	22.50%
36	4	10.00%
Total	40	

Survey Participants: 75
 Question Respondents: 40
 No Response Count: 1
 Parent Question 'Yes' Respondents: 41
 Parent Question Respondents: 70
 Response Rate: 98%

Figure 67: Planning any upgrades to the facility?	Count	Percent of Question Respondents
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Yes	23	34%
No	44	66%
Total	67	

Survey Participants: 75
 Question Respondents: 67
 No Response Count: 8
 Response Rate: 89%

Figure 67b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent of Question Respondents
3	3	13.04%
6	6	26.09%
12	11	47.83%
24	1	4.35%
36	2	8.70%
Total	23	

Survey Participants: 75
 Question Respondents: 23
 No Response Count: 0
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 67
 Response Rate: 100%

Figure 68: If No, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
Building is for sale	1	8%
Business capacity	1	8%
Change in ownership	1	8%
Ownership	2	17%
Space	4	33%

None	3	25%
Total	12	

Survey Participants: 75
 Question Respondents: 12
 No Response Count: 32
 Parent Question 'No' Respondents: 44
 Response Rate: 27%

Figure 69: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Broadband access	1	4%
Warehousing	1	4%
Energy costs	2	8%
Local regulations e.g. zoning	3	12%
Problems with DAs	4	15%
Identifying and accessing new markets	6	23%
Other (please specify):	7	27%
Finance	8	31%
Lack of suitable premises	11	42%
Lack of skilled staff	13	50%
Total	56	

Survey Participants: 75
 Question Respondents: 26
 No Response Count: 9
 Parent Question 'Yes' Respondents: 35

Parent Question Respondents: 71

Response Rate: 74%

Figure 69b: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
City must agree to sell the land to the academy	1	12.50%
Getting travelers to see Fernie as a summer destination	1	12.50%
Increased competition	1	12.50%
Lack of buildings	1	12.50%
Opportunity	1	12.50%
Parking	1	12.50%
being ready for opportunity	1	12.50%
conditions of available facilities	1	12.50%
lease costs	1	12.50%
ownership time to engage expansion	1	12.50%
Total	10	

Survey Participants: 75

Question Respondents: 8

No Response Count: 0

Figure 70: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
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Yes	10	31.25%
No	22	68.75%
Total	32	

Survey Participants: 75
 Question Respondents: 32
 No Response Count: 43
 Response Rate: 43%

Figure 70b: If Yes, which have you approached?	Count	Percent of Question Respondents
Chamber of Commerce	1	10%
Community Futures	1	10%
Local Council	4	40%
Other	7	70%
Total	13	

Survey Participants: 75
 Question Respondents: 10
 No Response Count: 0
 Parent Question 'Yes' Respondents: 10
 Parent Question Respondents: 32
 Response Rate: 100%

Figure 70c: If Yes, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
BBA (Basin Business Advisors)	1	10.00%
BDC (Business Development Bank of Canada)	1	10.00%

KRIC (Kootenay Rockies Innovation Council)	1	10.00%
Provincial Government	2	20.00%
CBT (Columbia Basin Trust)	3	30.00%
Total	8	

Survey Participants: 75

Question Respondents: 7

No Response Count: 0

Parent Question 'Other' Respondents: 7

Parent Question Respondents: 10

Response Rate: 100%

Figure 71: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	26	60%
No	17	40%
Total	43	

Survey Participants: 72

Question Respondents: 43

No Response Count: 29

Response Rate: 60%

Figure 72: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	43	63%
No	25	37%

Total	68
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Survey Participants: 75
Question Respondents: 68
No Response Count: 7
Response Rate: 91%

GOVERNMENT SERVICES

Figure 73: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	61	85%	8	11%	0	0%	2	3%	1	1%	72
Access to US Border	7	9%	0	0%	0	0%	49	66%	18	24%	74
Access to airport facilities	13	17%	13	17%	21	28%	25	33%	3	4%	75
Access to highway/ roads	3	4%	0	0%	3	4%	52	69%	17	23%	75
Access to markets	8	11%	5	7%	15	20%	40	53%	7	9%	75
Access to suppliers	4	5%	6	8%	29	39%	31	42%	4	5%	74
Availability of appropriately zoned land	22	33%	13	20%	8	12%	21	32%	2	3%	66
Availability of buildings for lease or purchase	16	22%	23	32%	14	19%	19	26%	1	1%	73
Availability of rail transport	55	79%	12	17%	1	1%	1	1%	1	1%	70
Availability of road transport services	0	0%	7	9%	23	31%	37	49%	8	11%	75
Availability of warehousing	44	63%	10	14%	5	7%	11	16%	0	0%	70

Development approval process	32	44%	8	11%	18	25%	14	19%	0	0%	72
Disposal of waste material	8	11%	10	14%	10	14%	37	51%	7	10%	72
Inspections /licensing	13	18%	3	4%	9	13%	41	57%	6	8%	72
Recycling	0	0%	7	9%	14	19%	43	57%	11	15%	75
Telecommunications (internet, cell)	1	1%	6	8%	9	12%	46	61%	13	17%	75
Water and sewerage supply	3	4%	2	3%	11	15%	53	73%	4	5%	73

Survey Participants: **75** 75

Figure 73b: Please rate the following: Other (please specify)	Please rate the following: Other (please specify)	Count	Percent of Question Respondents
Freight Service	Poor	1	33.33%
Total		1	33.33%

Survey Participants: 75

Question Respondents: 3

No Response Count: 72

Response Rate: 4%

Figure 74: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent of Question Respondents
Yes	31	56.36%
No	24	43.64%
Total	55	

Survey Participants: 75

Question Respondents: 55

No Response Count: 20

Response Rate: 73%

Figure 74b: 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
Enforce bylaws	1	3.33%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	1	3.33%
Expanded choice/ distribution of national newspapers	1	3.33%

Improve highway and road quality and service	1	3.33%
Increase Water Services	1	3.33%
Increase public transportation	1	3.33%
Postal service	1	3.33%
Snow removal	1	3.33%
Water quality	1	3.33%
Improve Airport service	2	6.67%
Improve shipping and receiving	3	10.00%
Streamline development approval processes	3	10.00%
Improve recycling and waste management	4	13.33%
Land zoning	5	16.67%
Total	26	

Survey Participants: 75
Question Respondents: 30
No Response Count: 1
Parent Question 'Yes' Respondents: 31
Parent Question Respondents: 55
Response Rate: 97%

Figure 75: Which airport services do you use?	Count	Percent of Question Respondents
Spokane	1	2%
Kalispell	10	18%
Cranbrook	31	56%
Calgary	37	67%
None	3	5%
Total	82	

Survey Participants: 75
Question Respondents: 55
No Response Count: 20
Response Rate: 73%

Figure 76: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Air shuttle to Vancouver	1	3%
International flights	1	3%
Larger aircraft	1	3%
Local Service	1	3%
Parking	1	3%
Scheduled flights	1	3%
Lower fares	2	6%
Food service	3	9%
More Airlines	3	9%
More destinations	3	9%
More flights	6	17%
Shuttle service	7	20%
Total	30	

Survey Participants: 75
 Question Respondents: 35
 No Response Count: 40
 Response Rate: 47%

BUSINESS CLIMATE

Figure 77: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	3	4%
Good	43	59%
Fair	26	36%
Poor	1	1%
Total	73	

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

Figure 78: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Chamber of Commerce	3	4%	0	0%	6	8%	36	49%	29	39%	74
Colleges/Universities	19	25%	6	8%	18	24%	31	41%	1	1%	75
Community Futures	43	64%	1	1%	1	1%	16	24%	6	9%	67
Cultural/Recreational Amenities	0	0%	4	5%	9	12%	39	52%	23	31%	75
Economic Development	12	16%	12	16%	30	40%	21	28%	0	0%	75
Housing	0	0%	25	33%	28	37%	19	25%	3	4%	75
K-12 education	22	30%	2	3%	3	4%	39	53%	8	11%	74
Local Government	7	10%	7	10%	26	36%	32	44%	1	1%	73
Local Tax Structure	14	20%	8	11%	23	32%	24	34%	2	3%	71
Technical Training	30	41%	15	20%	12	16%	16	22%	1	1%	74
Tourism services	3	4%	1	1%	9	12%	39	52%	23	31%	75
Workforce Availability	3	4%	13	17%	31	41%	25	33%	3	4%	75
Workforce Quality	3	4%	6	8%	26	35%	32	43%	7	9%	74

Workforce Stability	3	4%	16	21%	28	37%	27	36%	1	1%	75
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Survey Participants: 75

Figure 79: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	40	56%
No change	10	14%
Worse today	15	21%
No opinion	7	10%
Total	72	

Survey Participants: 75
 Question Respondents: 72
 No Response Count: 3
 Response Rate: 96%

Figure 79b: Please compare the local business climate today versus 5 years ago: If worse today, why?	Count	Percent of Question Respondents
Competition	1	6.67%
Less tourists	1	6.67%
Mine closure	1	6.67%
Declining economy	6	40.00%
Declining market	6	40.00%
Total	15	
Survey Participants:	75	
Question Respondents:	15	

No Response Count: 0

Parent Question 'Worse today' Respondents: 15
 Parent Question Respondents: 72
 Response Rate: 100%

Figure 80: Do you have any forecast for the condition of the local	Count	Percent of Question Respondents
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business climate 5 years from today?		
Will be better	42	61%
No change	16	23%
Will be worse	7	10%
No opinion	4	6%
Total	69	

Survey Participants: 75
 Question Respondents: 69
 No Response Count: 6
 Response Rate: 92%

Figure 81: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Great place to live	1	1%
Industry diversity	1	1%
Natural beauty	1	1%
Outdoor activities	1	1%
Social network	1	1%
Stable economy	1	1%
Vibrant downtown	1	1%
Word of mouth	1	1%
Affluent residents	2	3%
Customer loyalty	2	3%
Customer service	3	4%
Friendliness	3	4%
Natural attractions	3	4%
Diversified economy	4	5%
Location	4	5%
Recreational opportunities	4	5%
Lifestyle	12	16%
Tourism	12	16%
Supportive community	29	39%
Total	86	

Survey Participants: 75
 Question Respondents: 74
 No Response Count: 1

Response Rate: 99%

Figure 82: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Cross border shopping (US/Alberta)	1	1%
Development Constraints (Zoning/Bureaucracy/Permits)	1	1%
High business taxes	1	1%
Lack of suppliers	1	1%
Poor customer service	1	1%
Population (size/growth/aging)	1	1%
Shipping and Receiving costs	1	1%
Small market	1	1%
Too dependent on tourism	1	1%
Transient population	1	1%
Lack of support for local businesses	2	3%
Planning and development process	2	3%
Available space	3	4%
Inaccessible government services	3	4%
Cost of doing business	4	5%
Lack of amenities	4	5%
Resistance to change	4	5%
Geographic isolation	5	7%
Lack of skilled workforce	5	7%
High cost of living	6	8%
Dependent on one major industry	7	10%
Low population	7	10%
Seasonality	10	14%
Total	72	

Survey Participants: 75

Question Respondents: 73

No Response Count: 2
 Response Rate: 97%

Figure 83: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	58	79.45%
No	15	20.55%
Total	73	

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

Figure 83b: Are there any barriers to growth in this community? : If Yes, what are they?	Count	Percent of Question Respondents
Affordable housing	1	2%
Population (size / growth / age)	1	2%
Shipping costs	1	2%
Cost of living	2	3%
Resistance to change	2	3%
Transportation	2	3%
Availability of land	3	5%
Competition	3	5%
Seasonality	3	5%
Small market	3	5%
Cost of doing business	4	7%
Skilled labour	4	7%
Developmental approval process	6	10%
Low economic diversification	6	10%
Low population	7	12%

Geographic constraints	9	16%
Total	57	

Survey Participants: 75
 Question Respondents: 58
 No Response Count: 0
 Parent Question 'Yes' Respondents: 58
 Parent Question Respondents: 73
 Response Rate: 100%

Figure 84: 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	47	76%	0	0%	1	2%	2	3%	5	8%	7	11%	62
Chamber of Commerce	3	4%	0	0%	2	3%	6	9%	27	39%	31	45%	69
Community Futures	41	66%	1	2%	1	2%	2	3%	9	15%	8	13%	62
Continuing Education and Workforce Training	31	53%	1	2%	1	2%	5	9%	17	29%	3	5%	58
Economic Development Organization / Commission	43	83%	0	0%	4	8%	2	4%	2	4%	1	2%	52
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	51	84%	0	0%	1	2%	1	2%	5	8%	3	5%	61
Invest Kootenay	48	87%	0	0%	0	0%	0	0%	7	13%	0	0%	55
Kootenay Aboriginal Business Advocates Society	47	90%	0	0%	0	0%	1	2%	4	8%	0	0%	52
National Research Council Industrial Research Assistance	52	93%	0	0%	1	2%	1	2%	2	4%	0	0%	56
Scientific Research and Experimental Development Tax Incentive Program	55	98%	0	0%	0	0%	0	0%	1	2%	0	0%	56

Survey Participants: 72

Figure 85: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	23	31.51%
No	50	68.49%
Total	73	

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

Figure 85b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent of Question Respondents
Design Services	1	7%
Local artisans	1	7%
Meats & Dairy / Fruits and Vegetables / Grains	1	7%
Office supplies	1	7%
Technology companies	1	7%
Building supplies	2	14%
Coffee equipment /services	2	14%
Retail stores	2	14%
Total	11	

Survey Participants: 75
 Question Respondents: 14
 No Response Count: 9
 Parent Question 'Yes' Respondents: 23
 Parent Question Respondents: 73
 Response Rate: 61%

Figure 86: Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Food businesses	1	2%
Health and Wellness	1	2%
Information Technology	1	2%
Senior Services	1	2%
Manufacturing	2	4%
Recreational services	2	4%
Technology businesses	2	4%
Conference Centre	3	6%
Creative businesses	3	6%
Retail Stores	3	6%
Transportation	3	6%
Construction	5	11%
Educational services	5	11%
Tourism	8	17%
Total	40	

Survey Participants: 75

Question Respondents: 47

No Response Count: 28

Response Rate: 63%

Figure 87: 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	27	38%	21	30%	23	32%	71
Accessing capital	2	3%	15	21%	54	76%	71
Add or change in business, products or services	1	1%	8	12%	60	87%	69
Affordable shipping/freight	4	6%	8	11%	60	83%	72
Availability of telecommunications infrastructure and services	0	0%	1	1%	70	99%	71
Energy costs	5	7%	13	18%	54	75%	72
Exchange rate for Canadian dollar	3	4%	8	11%	61	85%	72
Expansion of workforce employees	4	6%	16	22%	52	72%	72
Improvement business management	1	1%	5	7%	64	91%	70
Improvement of customer services	0	0%	5	7%	67	93%	72
Improving worker productivity	3	4%	6	8%	63	88%	72

New market development locally	3	4%	11	15%	58	81%	72
New market development outside of region	1	1%	16	23%	53	76%	70
New product research and development	4	6%	11	15%	57	79%	72
Reliable air transportation	12	17%	22	31%	37	52%	71
Strategic alliances (joining with other businesses to provide products/services)	0	0%	11	15%	61	85%	72
Water/sewer availability	9	13%	14	20%	48	68%	71
Water/sewer costs	6	8%	22	31%	43	61%	71
Workforce skill development	3	4%	4	6%	65	90%	72
Workplace health and safety	3	4%	10	14%	59	82%	72

Survey Participants: 72

Figure 88: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	2	3%	3	4%	14	20%	36	51%	16	23%	71
Investing in people and skills	1	1%	2	3%	11	15%	39	55%	18	25%	71
Leadership and management capacity	2	3%	1	1%	8	11%	43	61%	17	24%	71
Measuring impact of productivity efforts/ investments	8	12%	9	13%	18	26%	30	43%	4	6%	69
Networking and collaboration with other businesses	3	4%	3	4%	12	17%	44	62%	9	13%	71
Organizing work (structures & processes)	1	1%	0	0%	11	16%	40	57%	18	26%	70
Productive workplace culture	2	3%	0	0%	4	6%	36	51%	29	41%	71

Survey Participants: 72

Figure 89: 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
Forestry	13	19%
Technology-based businesses	13	19%
Health & wellness	14	20%
Arts	16	23%
Construction	16	23%
culture and creative businesses	16	23%
Relocation of people from urban centres	19	28%
Tourism	64	93%
Other	43	62%
Total	245	

Survey Participants: 72

Question Respondents: 69

No Response Count: 3

Response Rate: 96%

Figure 89b: 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
extra employment of benefits	1	1.45%
Mining	37	53.62%
Total	38	

Survey Participants: 72
 Question Respondents: 38
 No Response Count: 5
 Parent Question 'Other' Respondents: 43
 Parent Question Respondents: 69
 Response Rate: 88%

Figure 90: Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
Yes	57	86.36%
No	9	13.64%
Total	66	

Survey Participants: 72
 Question Respondents: 66
 No Response Count: 6
 Response Rate: 92%

Figure 90b: Is your business impacted by its proximity to the Alberta border?: If Yes, please explain	Count	Percent of Question Respondents
Negative - Alberta competition	6	11%
Negative - Loss of sales to Alberta	10	18%
Positive - Alberta customers	17	31%
Positive - Alberta tourists	21	38%
Total	54	

Survey Participants: 72
 Question Respondents: 55
 No Response Count: 2

Parent Question 'Yes' Respondents: 57
 Parent Question Respondents: 66
 Response Rate: 96%

ASSESSMENT AND PLANS

Figure 91: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	16	33%
Good	25	52%
Fair	6	13%
Poor	1	2%
Total	48	

Survey Participants: 75
 Question Respondents: 48
 No Response Count: 27
 Response Rate: 64%

Figure 92: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	7	17%
Good	1	2%
Not applicable	33	80%
Total	41	

Survey Participants: 75
 Question Respondents: 41
 No Response Count: 34
 Response Rate: 55%

Figure 93: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	28	61%
Good	15	33%
Fair	3	7%
Total	46	
Survey Participants:	75	

Question Respondents: 46
 No Response Count: 29
 Response Rate: 61%

Figure 94: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	5	12%
Good	3	7%
Not applicable	34	81%
Total	42	

Survey Participants: 75
 Question Respondents: 42
 No Response Count: 33
 Response Rate: 56%

Figure 95: Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
Moderate	6	12%
Low	44	88%
Total	50	

Survey Participants: 75
 Question Respondents: 50
 No Response Count: 25

Response Rate: 67%

Figure 96: Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
High	1	2%
Moderate	6	13%
Low	41	85%
Total	48	

Survey Participants: 75
Question Respondents: 48
No Response Count: 27
Response Rate: 64%