COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON THE MINING AND METALLURGICAL SECTOR
SPRING 2016

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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.

The Kootenay Association for Science & Technology is a non-profit society representing and investing in the region's science, technology and manufacturing sectors. Since 1998, KAST has worked to foster a culture that values innovation and entrepreneurship as vital to the region's economic diversity and competitiveness. In 2015, KAST launched the Metallurgical Industrial Development Acceleration & Studies (MIDAS) project, an applied research, commercialization and digital fabrication training facility in Trail, B.C., focused on the metallurgical sector that exists in the region surrounding the Teck Trail Operations smelter. www.kast.com

The Metallurgical Committee of the LCCDTS promotes the development of the region's metallurgical businesses, including mining, metallurgical, environmental and related service industries, by encouraging and supporting innovative practices, networking and business development.

Executive Summary

This report describes findings from Business Retention and Expansion (BRE) surveys conducted at 40 businesses in the mining and metallurgical sector between 2012 and 2015. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities and business sectors 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 'Manufacturing', 'Professional, Scientific and Technical Services', and 'Construction' under the North American Industry Classification system.
	The location was the most frequently cited reasons given for businesses to locate in a given area, indicating the reliance on a dominant company.
	Most companies do not have any other locations.
	Over half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 2,716 employees.
	The majority of employees are full-time.
	55% of respondents were not aware of trends, technologies or other significant changes that would occur in their industry that would require new skills.
Sales	The size of the market for the product or service, and the market share, is stable or increasing for the vast majority of businesses.
	68% of businesses have their sales generated by their top 3 customers.
	82% of businesses report that their sales are to local customers.
	Businesses would like to source powder coating, steel and computers/software from local suppliers.
Facilities and Equipment	54% of businesses own the facility in which they operate.
	Nearly half of businesses plan to expand within 3 years, with 94% indicating that expansion will occur within the community.
	Top barriers to expansion are lack of identifying and accessing new markets and financing.
Government Services	Top rated government services include access to the US border, access to markets and access to highways/roads. The lowest ratings include availability of buildings for lease or purchase, availability of appropriately zoned land, and telecommunications.
	Improvements to expand telecommunication services, increasing airport service and improving airport service are the government services most in need of improvement
	The West Kootenay Regional Airport is the most used airport by local businesses.
Business Climate	The overall business climate was rated as good, and the majority of businesses believe that the business climate will improve over the next five years.
	Business climate factors that received the highest ratings include cultural and recreational amenities and the workforce quality.
	Businesses most commonly listed the lifestyle, as well as the stable economy and

	large industrial base as its greatest strength as a place to do business.
	The business competitiveness factors that are most important to respondents include workforce skill development, strategic alliances, and improving business management.
Assessment and Plans	The overall health of their company was rated as excellent by 30% of businesses and good by 62% of businesses.
	None of the businesses are at a high risk of closing or downsizing.

Local Workforce

The mining and metallurgical sector in the Kootenay/Boundary region employs a total of 2,716 employees. The vast majority (86%) of employees are full-time and live within the community in which they work. Combined with the skills gaps indicated in the recruitment data, we see an indication that the industry could benefit from coordinated recruitment activities outside of the region. Actions related to this theme include working with the various levels of government to address the concerns of local employees, promoting the value the industry contributes to local communities, and aggressive recruitment/marketing outside of the region.

Innovation

The ability for companies to remain relevant and competitive through awareness of new technologies and business practices is critical. This is evident in the stated training needs and in the analysis of business competitiveness factors. As a sector influenced by global conditions, remaining current with global trends and innovations is critical as is ensuring employees have the necessary skills for companies to remain competitive and relevant. Actions in this area could include promotion of and support through the newly formed Metallurgical Industrial Development Acceleration Studies (MIDAS) Centre. Recommendations include convening industry networks to discuss and share information on emerging technologies and industry practices. The new MIDAS centre would be ideal for this function. Further, promotion of the full package of MIDAS centre services and supports should be performed to lower barriers to innovation for the region's industry.

Training & Skill Development

The majority of businesses (67%) indicated that they do maintain a training budget to upgrade employee skills, and yet 61% of businesses indicated that the climate for technical training was poor. Future initiatives could include supporting and/or developing a network to help businesses identify shared training needs, promoting and/or developing training opportunities, and working with educational institutions to ensure local skill requirements are considered in programming.

Youth Employment

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

Business Growth & Expansion

53% of businesses in the region report being in a growth cycle, and 46% indicate that they are planning to expand within the next three years. The data gathered coupled with the general positive business climate (65% rate the local business climate as 'good') and the optimism for the future provides a positive report on local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of direct support in navigating regulations, identifying new markets, accessing financing, and connecting businesses with additional resources to assist in expansion projects. It is worth noting that very few businesses (9%) sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local support providers approach businesses proactively to understand barriers and work collaboratively towards solutions.

Economic Diversification

Low levels of economic diversification were identified as a barrier to growth by some respondents, as well as the challenges of a geographically remote location. The industry is highly dependent on Teck Trail Operations, in the local mining sector. Businesses identified manufacturing, construction, and recreational services as the most important sectors to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, technology based businesses, manufacturing, and green or environmental businesses. Actions to increase the diversification could include working with local businesses to identify new markets locally and elsewhere, and assessing new technologies, particularly green/environmental technologies as it relates to the mining industry. Continued collaboration between various levels of government, economic development practitioners, post-secondary institutions and local businesses towards a diversified economy will be key to achieving results in this area.

Supply Sourcing

The data indicates that the majority of supplies come from outside the local region, but that there exists a strong practice of sourcing local supplies, with 47% of businesses indicating they are able to source their supplies locally. There is an opportunity to engage in discussion with businesses in the sector 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. Supply chain analysis and gap analysis may provide information to the business network that may facilitate existing businesses, or new entrants, to move into the supply chain gaps.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 22% of respondents indicated that they have a formal succession plan and less than half have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

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Project Overview

This report describes the findings from Business Retention and Expansion (BRE) surveys[1] of 40 businesses from across the Columbia Basin, but chosen predominantly from the West Kootenay/Boundary region, involved in the mining and metallurgical sector specifically. These surveys were conducted between 2012 and 2015.

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

This report was commissioned through the KAST / LCCDTS Metallurgical Committee partnership. Funding for the interviews was provided by the Columbia Basin Trust.

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 and industry sectors learn about the concerns of, as well as opportunities for, businesses and to set priorities for projects to address those needs. Ultimately, communities and industries 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

Typical project objectives are to:

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

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

4. Encourage the business community’s active involvement in economic development.

Research Considerations

The BRE Survey

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data presented in this report was 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. 39 of the 40 businesses completed the additional thirteen region specific questions.

The Data Set

The companies that participated in the interviews were identified and selected as part of each of their communities’ individual Business Retention and Expansion projects. Selection criteria differs with each community, but typically includes a review of business license information and North American Industry Classification System (NAICS) codes to ensure a representative cross section of the business community. Subsequent to those community based survey, the companies included in this report were selected from across the Columbia Basin metals sector. A total of 40 businesses from the metals sector were selected for inclusion in this report.

Data Collection

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

Data Input, Analysis and Reporting

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

Quantitative data are analysed using descriptive statistics and qualitative data are 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 KAST. Findings and related recommendations were assembled into this report by RDI researchers.

DATA COMBINING AND SPECIAL REPORT NOTE

This BRE study added to a selection of interviews performed under the KAST/KRIC Manufacturing and Technology Sector (MATS) BRE. This approach created a number of data management issues. Combining recent interviews with a partial selection[2] of previous BRE interviews, proved challenging. As a result, the initial analysis missed two companies identified by KAST as part of the Metallurgical sector.

After the first draft of this report, RDI researchers extracted the remaining two company interviews and reviewed the report in light of the missing data. It was determined that the missing data only minimally impacted the results of this report. The RDI researcher has scoured this report to ensure that there are no misleading statements and that all recommendations represent the full data set. The appendices (data tables) have all been updated with the full data set. Due to resource constraints, the one facet of this report that has not been updated is the graphs. The graphs in this report are formed from only 39 of 40 companies.

[2] The MATS BRE interviewed many companies that fell into neither a related industrial field, or within the geographic scope of the present study. It proved difficult to create a smooth system for selecting these companies.

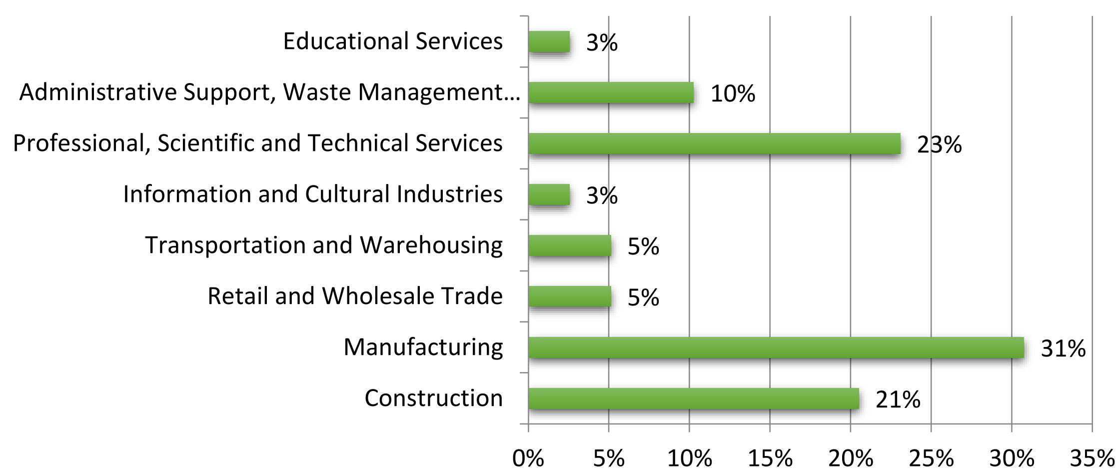
RESEARCH FINDINGS[3]

COMPANY INFORMATION

Type of Product/Service Offered

The majority of businesses interviewed were clustered in three areas: manufacturing (31% or 12 respondents), professional, scientific and technical services (23% or 9 respondents), and construction (21% or 8 respondents).

Figure 1: Industry classification



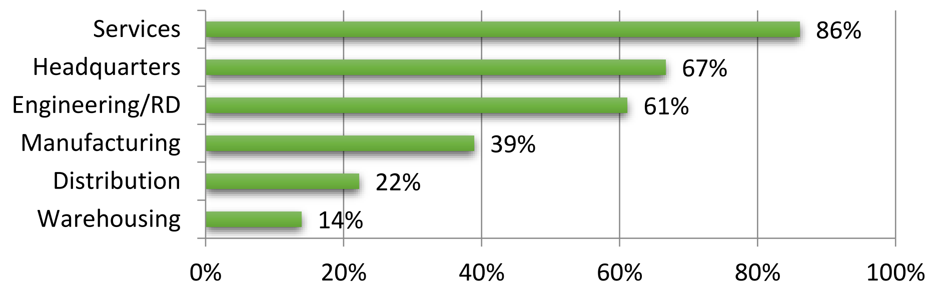
Note: 39 respondents

Facility Function

The majority of respondents (86% or 31 respondents) indicated that their facility provides services. Other primary functions include headquarters (67% or 24 respondents) and engineering/R&D (61% or 22 respondents). Fewer respondents indicated that their facility serves as manufacturing, distribution, or warehousing.

[3] In many instances respondents provided multiple answers, resulting in responses which exceed the number of respondents. Consequently, percentages can exceed 100%. See, for example, Figure 2.

Figure 2: Facility function(s)

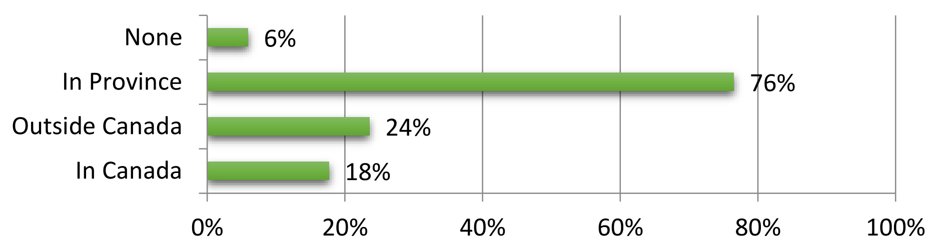


Note: 36 respondents

Competition

The vast majority of competition (76 % or 13 responses) reported was coming from within the province[4].

Figure 3: Location of primary competitors



Note: 17 respondents

[4] Multiple competitors were listed by respondents resulting in more responses than number of respondents.

Factors for Success

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

When asked what factors made their company successful in this region, the highest number of respondents (21 % or 8 businesses) cited Location. Reputation (16% or 6 businesses), Quality product/service, knowledgable staff, and experience (all referenced by 11% or 4 businesses), were also discussed frequently.

"Very driven as a group. Driven to deliver quality work."

"Teck is a big and regular customer that helps keep things steady."

"We are professional, practical and offer practical solutions. We work hard to get the work done and take a realistic approach."

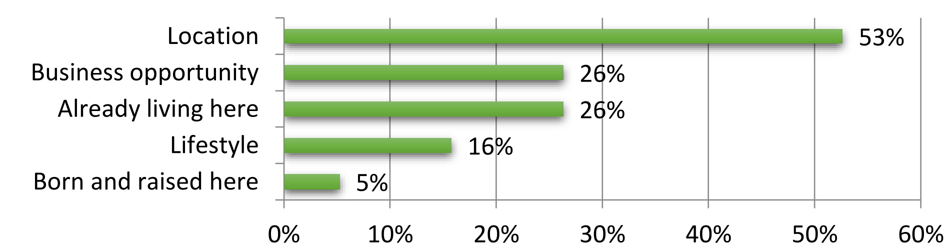
"Product development is the main thing."

"Having a broad suite of resources to draw on as a one stop shop - integration of services.

Choosing Location

The location (53% or 10 respondents) commonly was most cited for the reason the business was located in the community. Other frequently cited reasons include the business opportunity and the fact they were already living in the community (26% or 5 respondents).

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

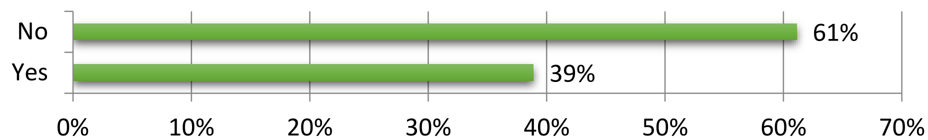


Note: 19 respondents

Other Locations

61% of respondents (22 respondents) indicated that their company does not have any other locations.

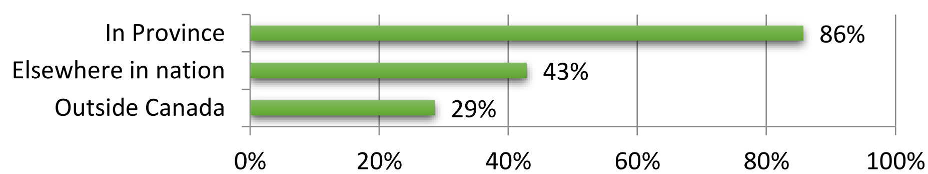
Figure 6: Other Locations



Note: 36 respondents

86% of those other locations (6 respondents) are in other areas of the province, 43% (3 respondents) are in other parts of Canada and 29% (2 respondents) indicated that their company has another location outside of Canada. [5]

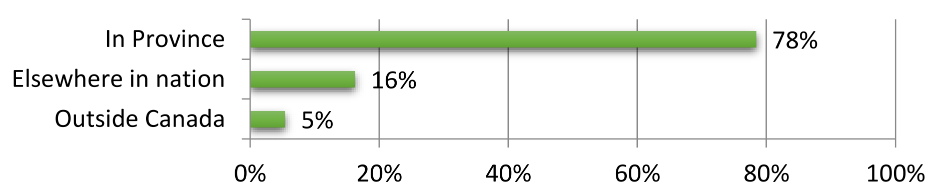
Figure 7: Location of Other Locations



Note: 7 respondents

78% (13 businesses) of respondents reported that their headquarters are located in British Columbia, 16% (6 businesses) indicated that they are headquartered elsewhere in Canada and 5% (2 businesses) indicated that their headquarters are located in another country.

Figure 8: Location of headquarters



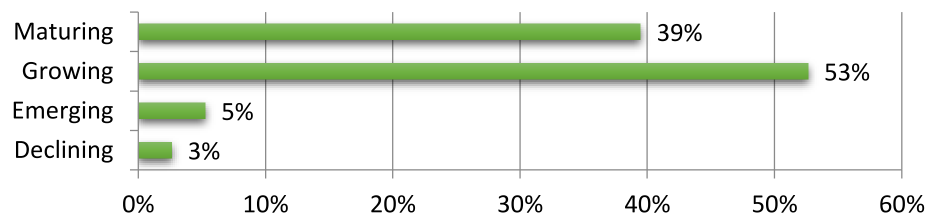
Note: 37 respondents

[5] Responses reflect that respondents can have other locations in more than one other location. Therefore total number of other locations exceeds number of respondents.

Age and Life Cycle Stage

Just over half of respondents (53% or 20 respondents) reported that their business is in the 'growing' life cycle stage. Another 39% (15 businesses) indicated that their business is in the 'maturing' stage. Only 5% (2 businesses) indicated that they are in the 'emerging' stages, and just one business (3%) indicated that they were declining.

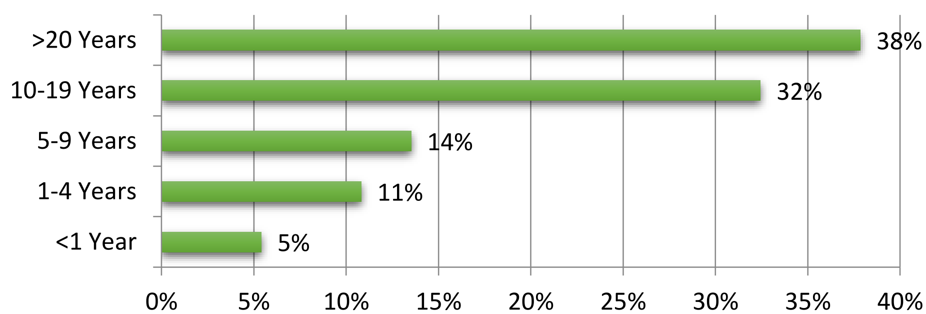
Figure 9: Life cycle stage



Note: 38 respondents

Most businesses (14 respondents or 38%) reported that they have been in business for more than 20 years. A significant number reported that they have been in business for between 10 and 19 years (12 respondents or 32%).

Figure 10: Length of time in business

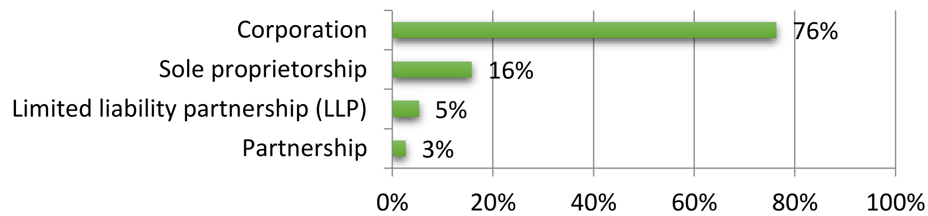


Note: 37 respondents

Ownership and Management

87% (33 respondents) indicated their company is privately owned. Most respondents (29 respondents or 76%) indicated that their business is classified as a corporation, while 16% (6 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (1 respondent) or limited liability partnership (2 respondents).

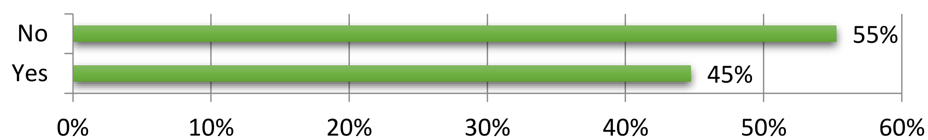
Figure 11: Type of business



Note: 38 respondents

55% of businesses (21 businesses) have not seen a management or ownership change in the last 5 years, while 45% of businesses (17 businesses) have changed management and/or ownership over that same period of time. Of the 17 respondents that have seen changes in management and or ownership, 94% (15 businesses) report that change has had a positive impact. Four businesses (11%) are expecting an ownership change in the near future.

Figure 12: Ownership and management changes in last 5 years

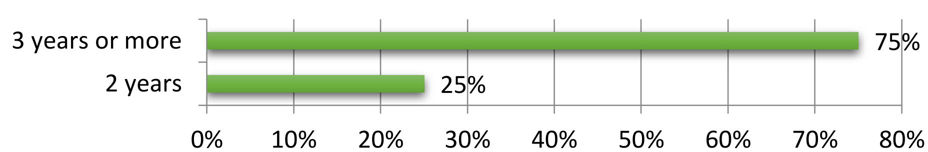


Note: 38 respondents

Succession and Business Plans

Of the four businesses that responded and reported a pending ownership change, one expects the change will happen in two years, while three expect the process to take 3 years or more.

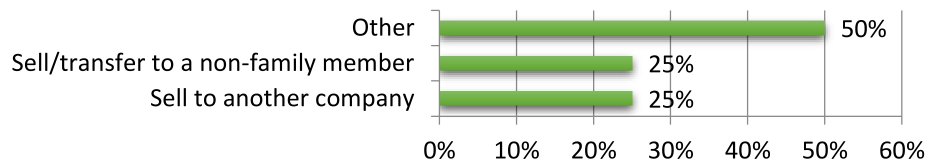
Figure 13: Anticipated timeline for ownership change



Note: 4 respondents

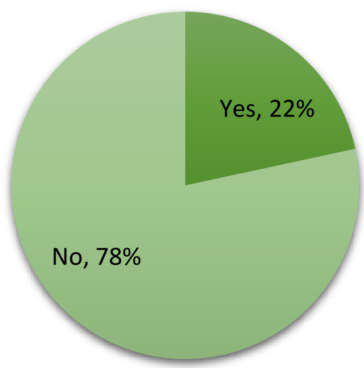
25% of respondents (1 respondent) expect that the current owner will exit the business by selling it to another company, while another respondent (25% or 1 respondent) expect it to be sold/transferred to a non-family member. Of the two 'other' responses given (50% or 2 respondents), one respondent didn't know how they intended to exit the business, and the other indicated it would be through an employee share purchase plan.

Figure 14: Anticipated exit strategy



Note: 4 respondents

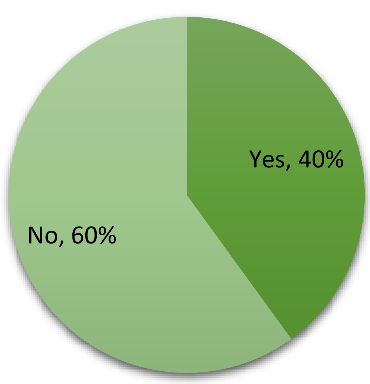
Figure 15: Existence of formal succession plan



Only 22% (8 respondents) of respondents reported that they have a formal succession plan in place. Three respondents (60%) indicated they received assistance in preparing their succession plan, with assistance coming from a business partner (1 respondent or 33%) or an accountant (2 respondents or 67%). Further, only six have identified a successor to the business.

Note: 37 respondents

Figure 16: Existence of current business plan



Less than half of all respondents (40% or 14 respondents) indicated that they have a business plan in place.

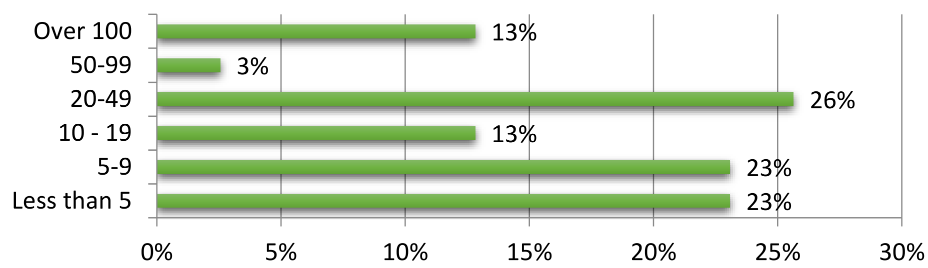
Note: 35 respondents

Local Workforce

Size of Workforce

The 39 businesses interviewed reported a total of 2,716 employees. 26 % or 10 of the businesses surveyed indicated that they have between 20 and 49 employees, while 23% or 9 businesses indicated they have between five and nine employees or less than five.

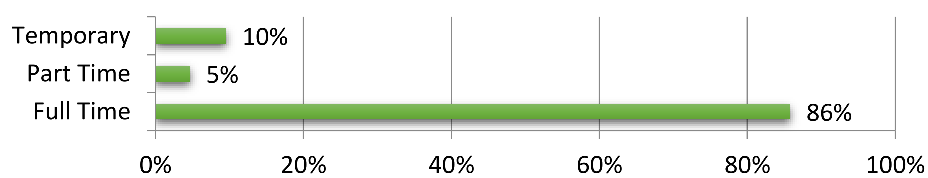
Figure 17: Total number of employees



Note: 39 respondents

86% (2,330) of employment positions at surveyed businesses are full-time, while only 10% (259) are temporary and 5% (127) are temporary.

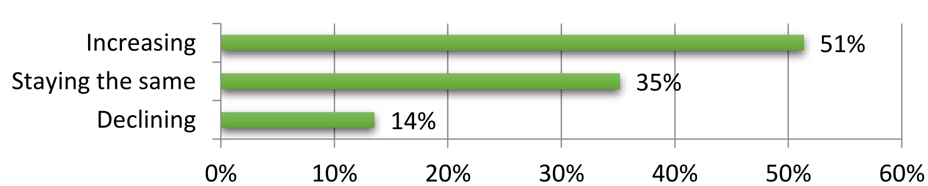
Figure 18: Nature of employment



Note: 39 respondents

35% of respondents (13 businesses) indicated that the number of employees at their business has stayed the same historically. While 51% (19 businesses) indicated that the size of their workforce has increased. Only 14% (5 businesses) indicated a decrease.

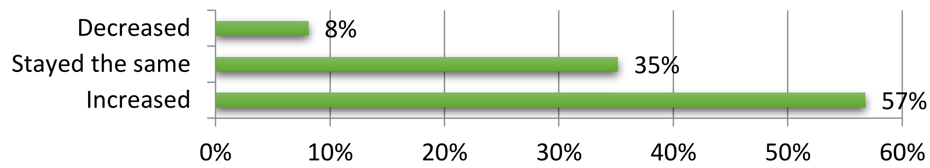
Figure 19: Historical Employment trend



Note: 37 respondents

The last three years has seen increased and stable growth in the size of the full-time workforce, with 57% of businesses (21 respondents) reporting an increase in the number of employees, and 35% (13 respondents) reporting that full-time employment over that three year time period has remained constant.

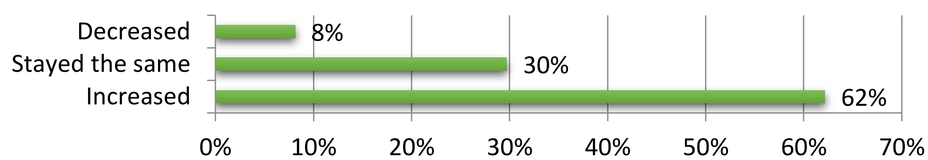
Figure 20: Full-time employment trend over last 3 years



Note: 37 respondents

62% of businesses (23 respondents) interviewed expect the size of their full-time workforce will increase over the next 3 years, while 30% (11 respondents) expect it to stay the same. Three businesses (8%) indicated they expected a decrease over the next 3 years.

Figure 21: Full time employment trend over next 3 years

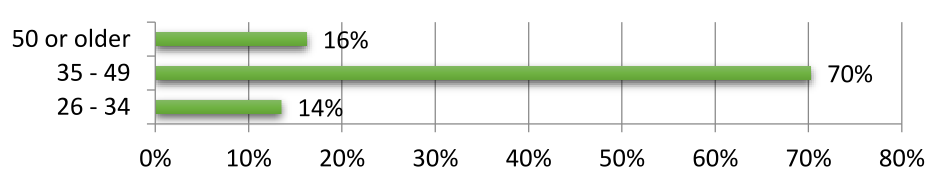


Note: 37 respondents

Workforce Demographics

Of the responses received, 70% (26 responses) indicated that the majority of their essential employees are between 35 and 49 years old. There were no reported essential employees less than 25 years of age.

Figure 22: Age of the majority of essential employees

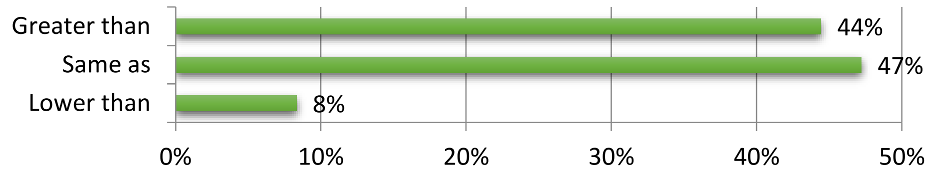


Note: 37 respondents

Wages

When reporting on average wages for skilled or professional workers, the majority of responses (50% or 16 businesses) indicated they pay between $30 and $49 per hour. The most commonly reported average wage for semi-skilled workers (58% or 14 businesses) was under between $20 and $29 and the most commonly reported average wage for entry-level workers (30% or 7 businesses of respondents) was $20 to $29. 47% of respondents (17 respondents) reported that their wage scale is similar to other businesses in the region.[6]

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

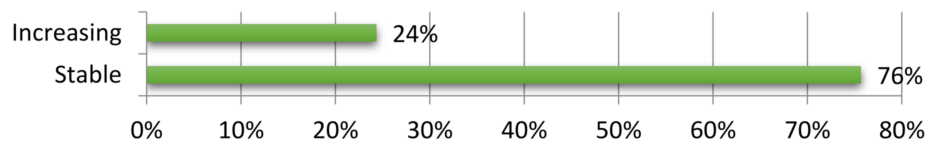


Note: 36 respondents

Recruitment and Retention

Of those businesses that responded, 76% (28 respondents) indicated that the number of unfilled positions at their company would remain constant.

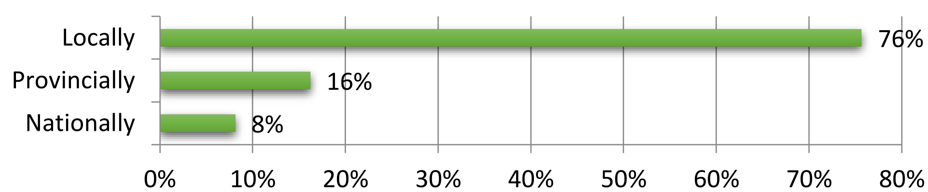
Figure 24: Trend in unfilled positions



Note: 37 respondents

The majority of respondents (76% or 28 respondents) reported that they primarily recruit employees from local labour markets. 16% (6 respondents) recruit provincially, while 8% (3 respondents) report that they recruit nationally. It is worth noting that no businesses reported international recruitment.

Figure 25: Location of workforce recruitment



Note: 37 respondents

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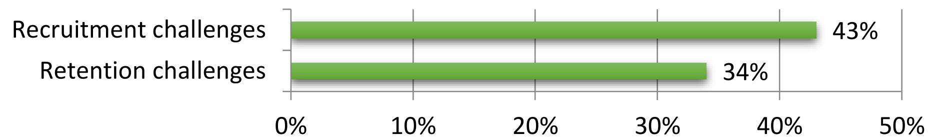
[6] Detailed wage data is found in Appendix A.

Of the 38 respondents, 43% (16 respondents) indicated that they have experienced recruitment challenges and 34% (13 respondents) indicated that they have experienced retention challenges.

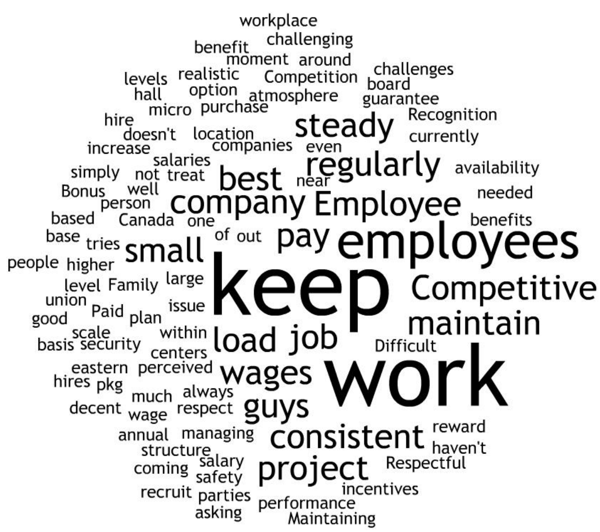
Figure 26: Recruitment and retention challenges



Note: 38 respondents

The most frequent response in discussing employee retention issues was competitive wages (38% or 11 respondents). Avoiding layoffs (31% or 9 respondents) and supporting a positive environment (17% or 5 respondents) were other topics discussed.

Figure 27: Key words and responses in respondents' discussion of retention challenges



“People are regularly coming to them and asking if they have work. They have no trouble finding and keeping employees.”

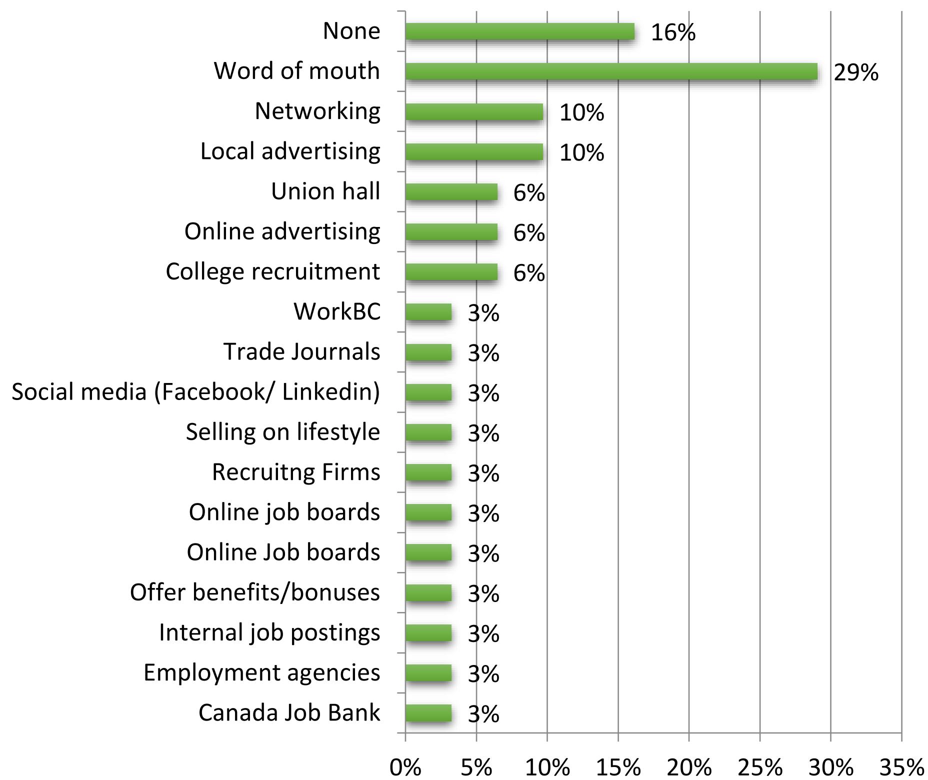
“They pay well, and have a good consistent level of interesting and challenging work. That seems to keep people around.”

“Creating a fun work atmosphere - Every 4-6 weeks they get out of the office for a fun day such as biking, paddling, rafting etc.”

“Providing a satisfying, respectful workplace and paying respectful wages.”

When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often were word of mouth (29% or 9 respondents), local advertising and networking (10% or 3 respondents). Respondents also cited using union halls, online advertising, and college recruitment (6% or 2 businesses).

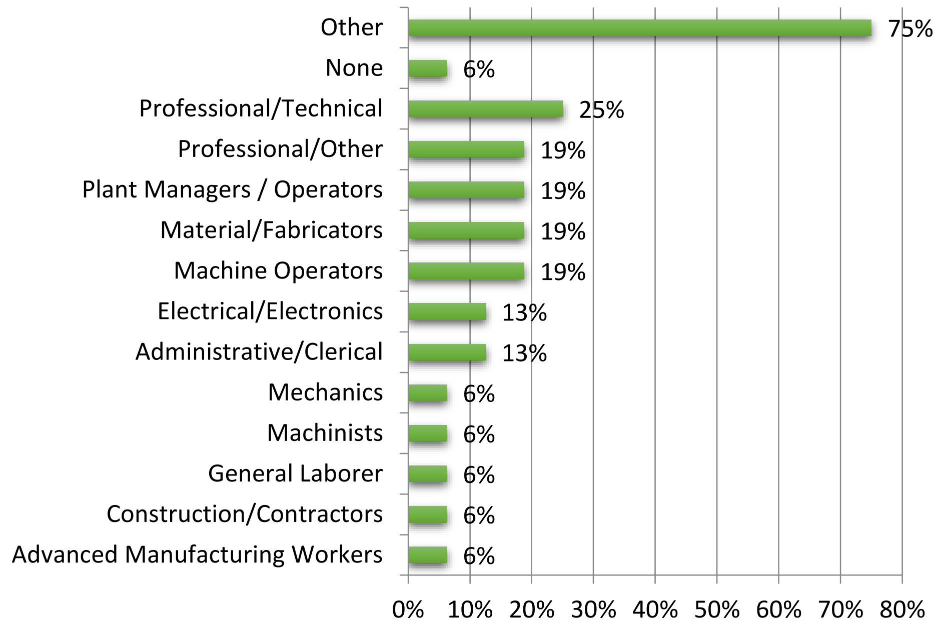
Figure 28: Recruitment Activities



Note: 31 respondents

Of the 16 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include professional/technical (25% or 4 respondents), professional/other, plant managers/operators, material/fabricators, and machine operators (19% or 3 respondents respectively). The responses included in the 'other' categories charted below are detailed in Appendix A.

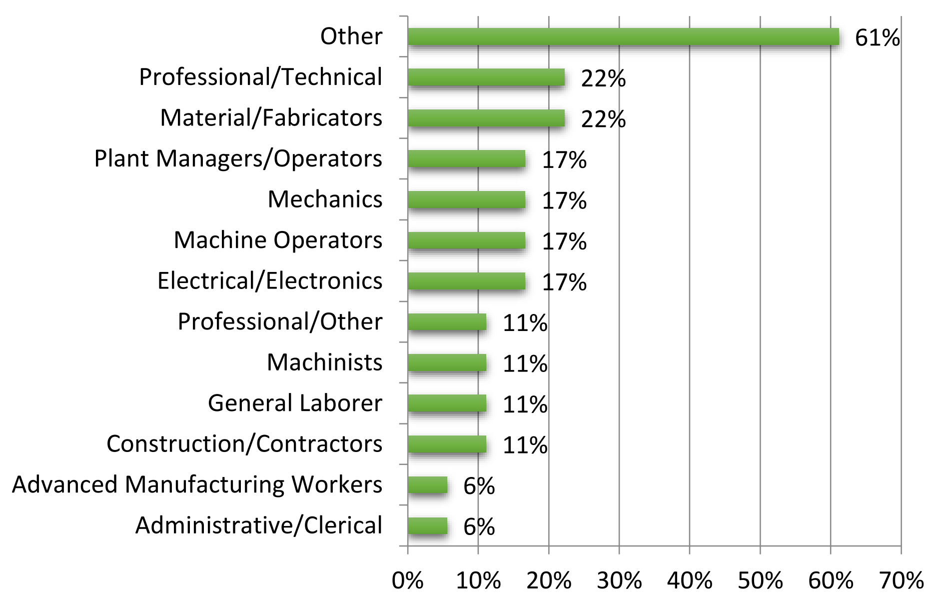
Figure 29: Current recruitment areas



Note: 16 respondents

49% of respondents (18 businesses) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include professional/technical (22% or 4 respondents) and material/fabricators (22% or 4 respondents). The responses included in the 'other' categories charted below are detailed in Appendix A.

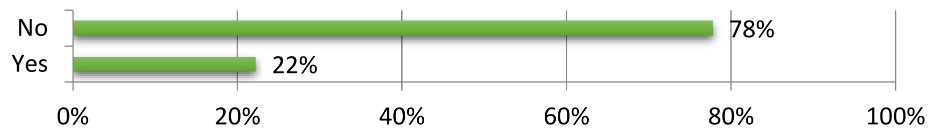
Figure 30: Future areas where recruitment may be challenging



Note: 18 respondents

78% of respondents (14 respondents) indicated that they believed that there were not strategies that could be undertaken to address employee recruitment. Word of mouth (29% or 9 respondents), networking (10% or 3 respondents), and local advertising (10% or 3 respondents) were the most frequently cited strategies employers have undertaken to recruit employees.

Figure 31: Strategies to overcome employee recruitment challenges

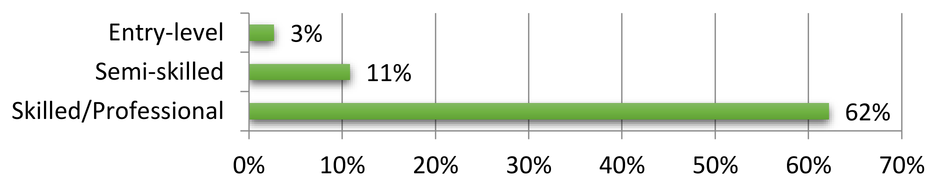


Note: 18 respondents

Skills and Training

The majority of respondents (62% or 23 respondents) indicated that over half of their workforce is comprised of skilled or professional workers, 11% (4 respondents) indicated that their workforce is mainly semi-skilled workers and 3% (1 respondent) indicated that entry-level workers make up the majority of their workforce.

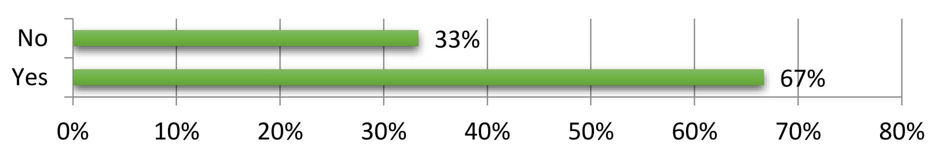
Figure 32: Skill level of majority of workforce



Note: 37 respondents

67% (24 businesses) indicated that there is a training budget to upgrade employee skills. 58% (11 businesses) indicated that their company offers in-house training. Just 11% (2 businesses) use contracted training.

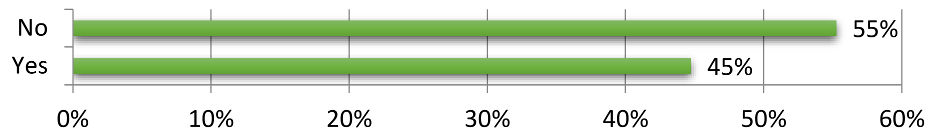
Figure 33: Training Budget



Note: 36 respondents

55% of respondents (21 businesses) indicated that they were not 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: 38 respondents

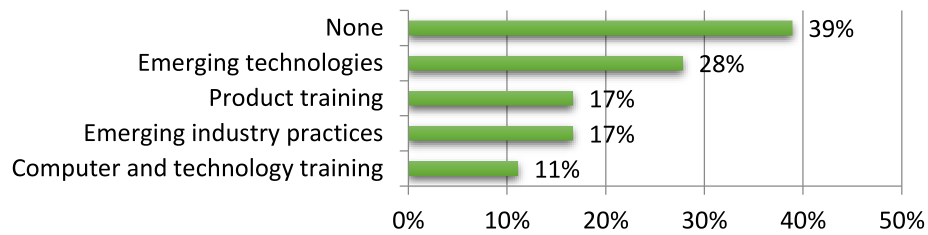
65% or 24 respondents indicated that there are areas of training or professional development that would benefit their employees or themselves. Most commonly listed among these areas were business management (17% or 4 businesses), followed by sales/marketing, managerial training, and customer service (all cited by 13% or 3 businesses).

Figure 35: Training or professional development needs

Note: 24 respondents

When asked what new training might need to be considered in the next five years, the most commonly cited response, after ‘none’ (39% or 7 businesses) was in the area of emerging technologies (28% or 5 businesses). Other areas where training will be needed include product training and emerging industry practices (17% or 3 businesses).

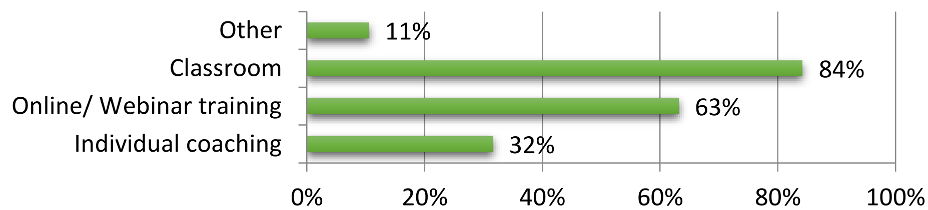
Figure 36: Areas for new Training in next five years



Note: 18 respondents

84% of respondents (32 businesses) stated that they prefer training when it is delivered in a classroom format, while 63% (24 businesses) preferred online or a webinar style format, 32% or 12 businesses expressed a preference for individual coaching.

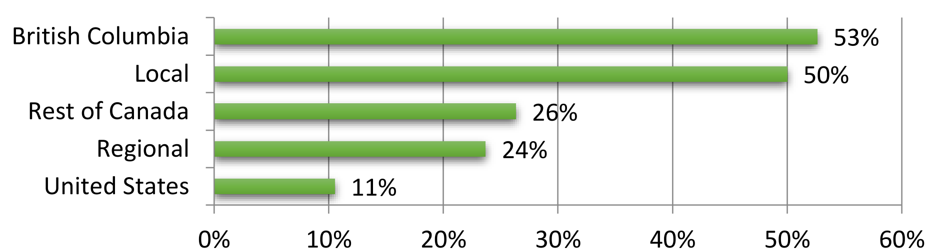
Figure 37: Preferred modes of training



Note: 38 respondents

53% of respondents (20 businesses) typically seek training opportunities that are offered within the province, and 50% (19 businesses) seek training within the local area. Fewer training opportunities are sought elsewhere in the region, country or in the United States.

Figure 38: Usual training locations



Note: 38 respondents

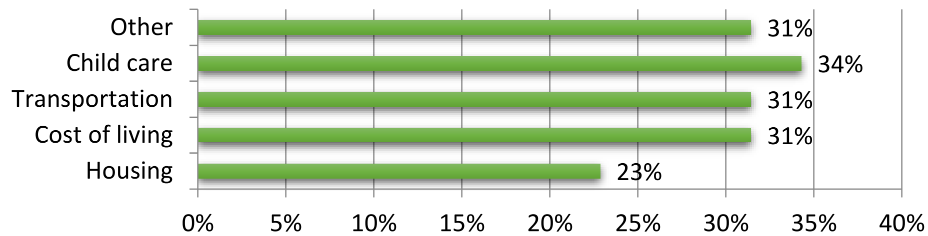
Unions

Eight businesses (21%) reported that they have union status.

Employees

The most frequently cited critical issues for employees are child care (34% or 12 businesses). Transportation, cost of living, and 'other' were each cited by 31% or 11 businesses. For a list of factors included in the "other" category charted below, see Appendix A.

Figure 39: Critical considerations for employees



Note: 35 respondents

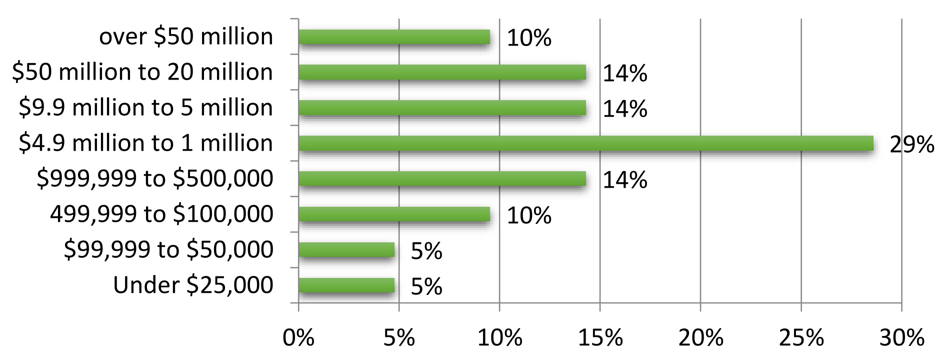
86% of businesses (31 businesses) interviewed reported that over 75% of their employees live within the community, 5% (1 business) indicated that 75% of the employees live elsewhere in the region and 5% (1 business) indicated that they live outside of the region.

SALES

Market Size and Share

The highest number of respondents (6 businesses or 29%) reported annual sales between $1 million and $4.99 million. 46% (18 businesses) of respondents did not share annual sales information.

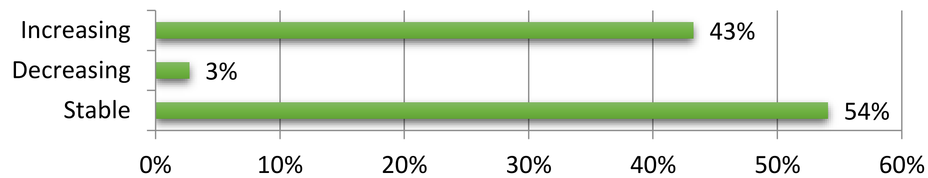
Figure 40: Annual sales



Note: 21 respondents

The majority of businesses interviewed (54% or 20 businesses) indicated that the size of the market for their product or service is stable. Another 43% (16 businesses), reported that the market is increasing.

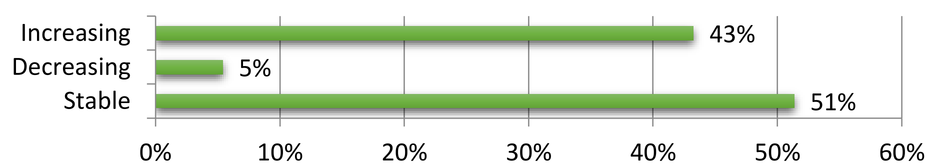
Figure 41: Status of market for product/service



Note: 37 respondents

51% (19 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is stable, while 43% (16 businesses) indicated that it is increasing. A small number of respondents (5% or 2 businesses) indicated that their market share is decreasing.

Figure 42: Market Share in Comparison to Competitors

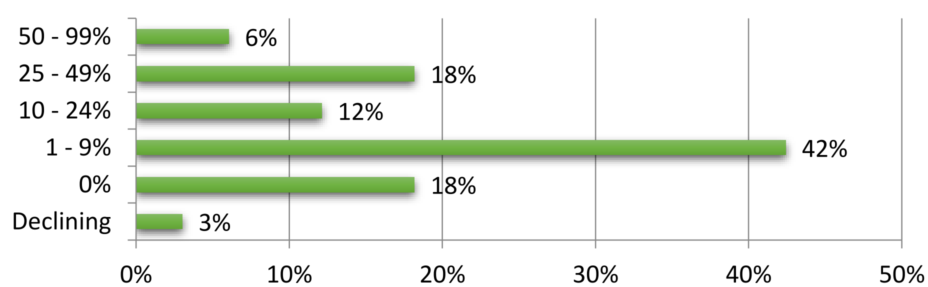


Note: 37 respondents

Growth

42% of respondents (14 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 12% of respondents (4 businesses). 6% of respondents (2 businesses) expect strong growth in the next year. 18% (6 businesses) of respondents expect their sales to remain stagnant, while a further 3% (1 business) expects sales to decline.

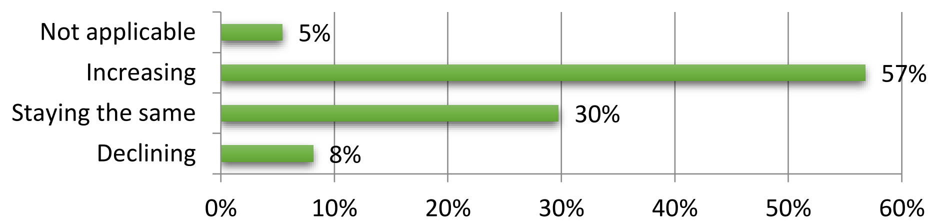
Figure 43: Projected sales growth in the next year



Note: 33 respondents

In looking back over the past five years, the majority of responses (57% or 21 businesses) indicated that sales at their business have increased over time, 30% (11 businesses) indicated that sales have remained relatively stable and 8% (3 businesses) reported that sales have declined.

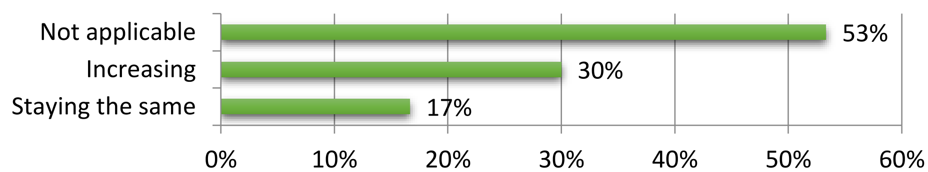
Figure 44: Historic sales trend at this location



Note: 37 respondents

Data indicates that the sales trend at parent companies is only slightly different from sales trends at this location. 30% or 9 businesses reported that sales at their parent company have historically increased and only 17% (5 businesses) reported that they have stayed the same.

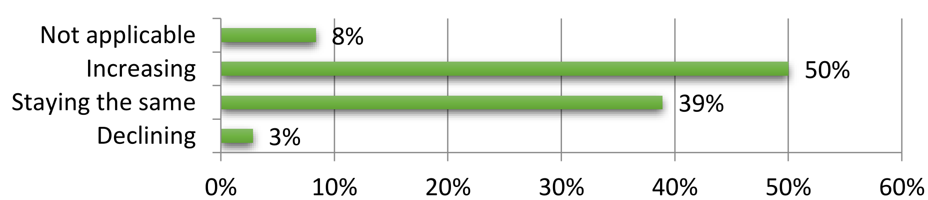
Figure 45: Historic sales trend at parent company



Note: 30 respondents

Data indicates that the sales trend within industry has generally followed the sales trend reported for the company's. 50% percent of respodents (18 businesses) reported that sales within their industry have been increasing while 39% (14 businesses) reported that they have stayed the same.

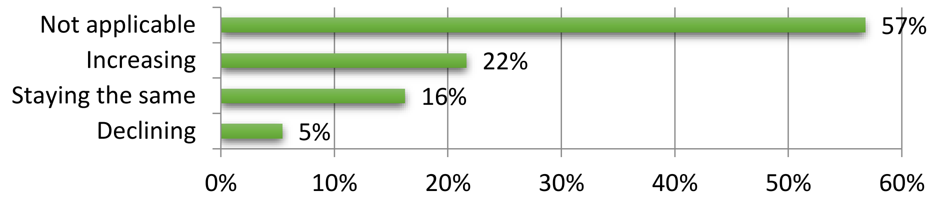
Figure 46: Historic sales trend within the industry



Note: 36 respondents

Of the 16 businesses that reported exporting to international markets, 22% (8 businesses) indicated that their export sales have been increasing and 16% (6 business) indicated that they have been stable, while 5% (2 businesses) report a decline.

Figure 47: Historical export sales trend

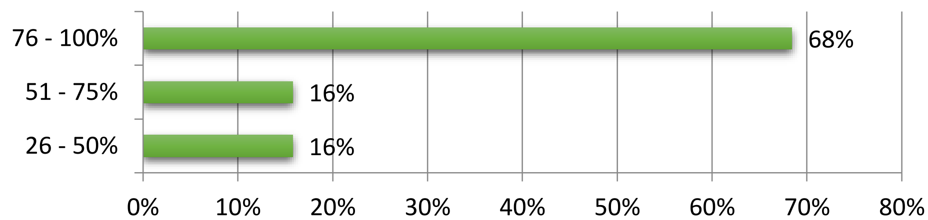


Note: 37 respondents

Source of Sales

The customer base in this sector appears to be fairly reliant on a core customer base, with the largest percentage of respondents (68% or 13 businesses) indicating that 76% - 100% of their sales are generated by their top 3 customers.

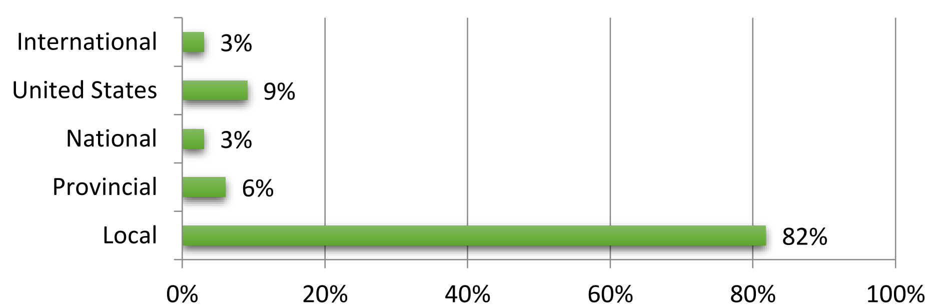
Figure 48: Sales generated by top 3 customers



Note: 19 respondents

A majority of respondents (82% or 27 respondents) indicated that over 50% of their sales are to customers within the local area. 9% (3 businesses) indicated that over 50% of their sales are within the United States. Fewer respondents (6%,3%, 3%) indicated that the majority of their sales are to provincial, national, or international markets, respectively.

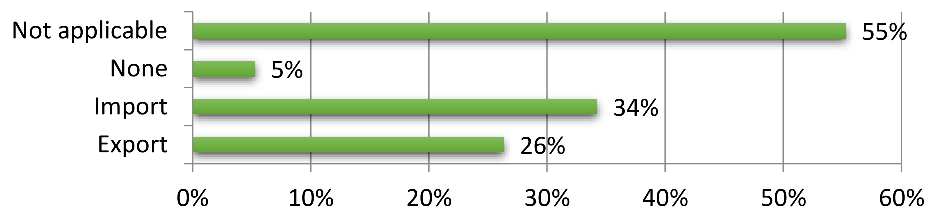
Figure 49: Geographic source of majority of sales



Note: varies - refer to Appendix A

13 respondents (34%) indicated that they import goods or services from other countries and 10 respondent (26%) indicated that they export goods or services to other countries. 55% of respondents (21 respondents) stated the question was not applicable.

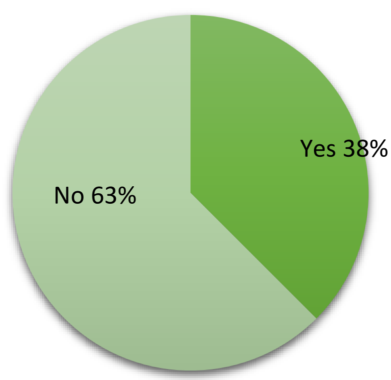
Figure 50: International trade status



Note: 38 respondents

Procurement

Figure 51: Engagement with government procurement processes

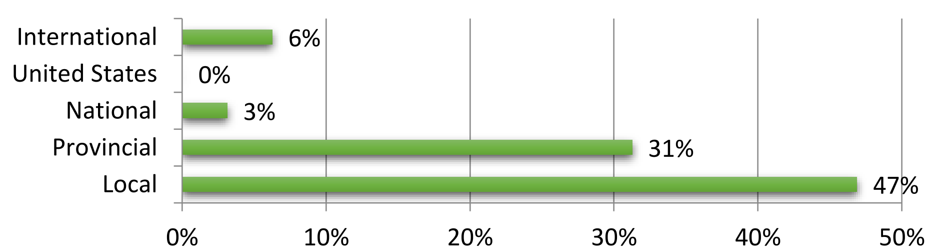


Of the 24 responses provided, only 38% (15 respondents) indicated that they do engage in government procurement.

Note: 24 respondents

47% of respondents (15 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 31% (10 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 52: Geographic source of majority of supplies

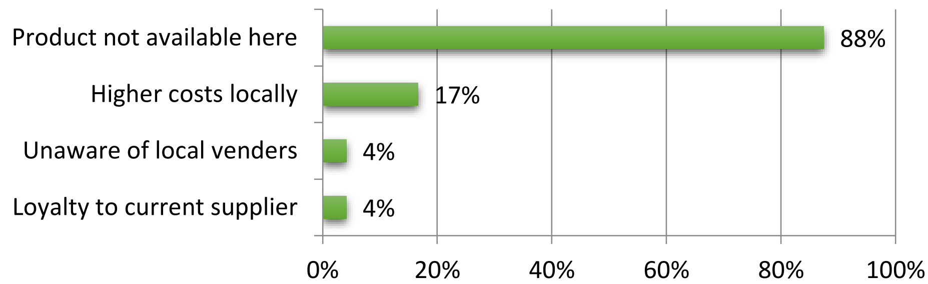


Note: varies - refer to Appendix A

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (88% or 21 businesses) indicated that the products they need are not available locally.

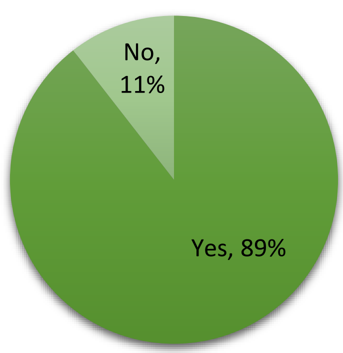
Figure 53: Reason for out-of-area purchasing



Note: 24 respondents

Products that businesses stated they would like to source from a local supplier include powder coating, steel, computers/software.

Figure 54: Supplying products/services within the community/region



When asked whether the respondents own business supplied products/services within the community/region, a strong majority (89% or 17 businesses) reported that they did.

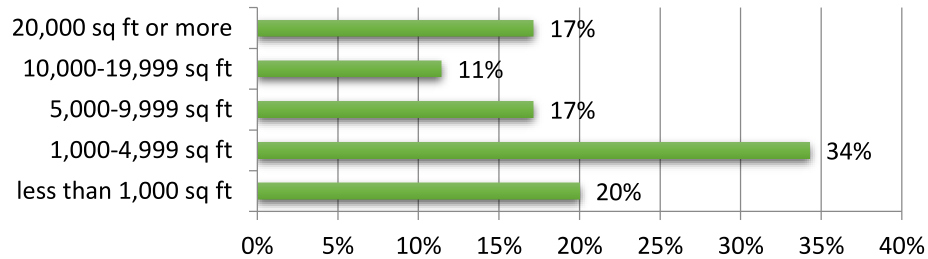
Note: 24 respondents

Facilities and Equipment

Size and Condition

34% (12 businesses) of respondents reported that their facility is between 1,000 and 4,999 square feet in size, and another 20% (7 businesses) indicated it was less than 1,000 square feet.

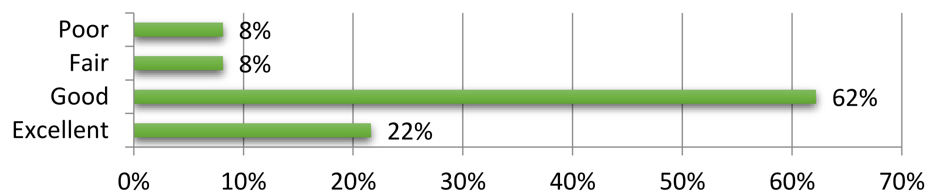
Figure 55: Size of facility



Note: 35 respondents

62% of respondents (23 businesses) indicated that their facility is in good condition. Another 22% (8 businesses) indicated that it is in excellent condition and 8% (3 businesses) reported that their facility is in fair or poor condition respectively.

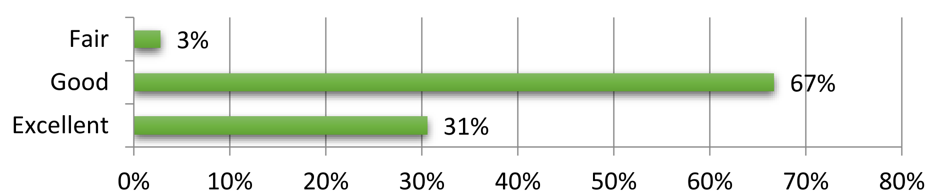
Figure 56: Condition of facility



Note: 37 respondents

67% (24 businesses) of respondents indicated that their equipment is in good condition. 31% (11 businesses) indicated that it is in excellent condition and just 3% (1 business) report their equipment is in fair condition.

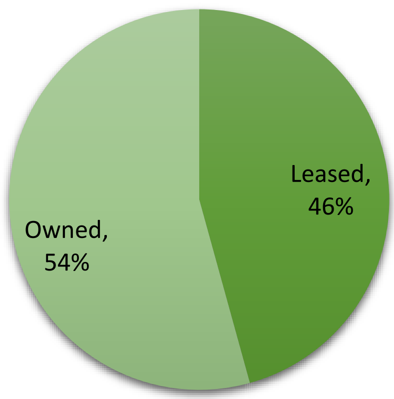
Figure 57: Condition of equipment



Note: 36 respondents

Ownership

Figure 58: Ownership status of facility

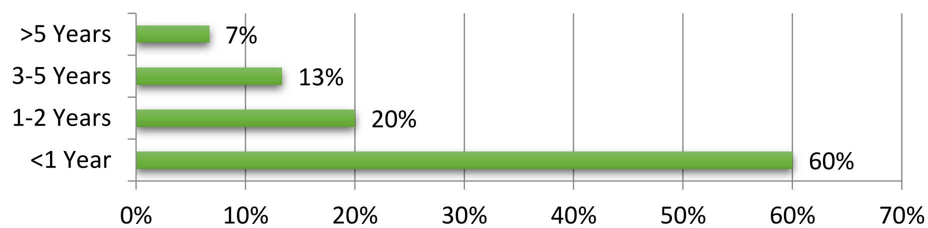


54% of respondents (19 businesses) own the facility in which they operate and 46% (16 businesses) lease it.

Note: 35 respondents

Of the 16 businesses that lease their facility, 60% have less than a year remaining on their lease and 20% have between 1 and 2 years remaining. The majority of respondents that lease their facility (95% or 18 businesses) intend to renew their current lease agreement. Preference towards leasing or owning was split nearly equally, with 47% preferring lease arrangements, and 53% preferring owning.

Figure 59: Length of time remaining on lease

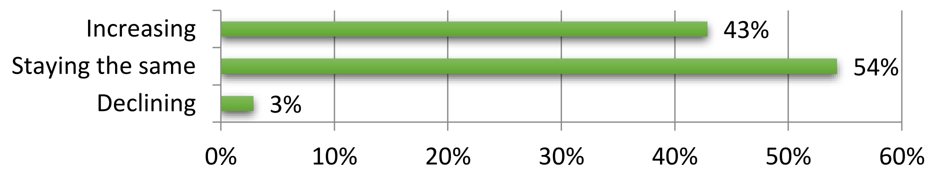


Note: 15 respondents

Investment and Expansion

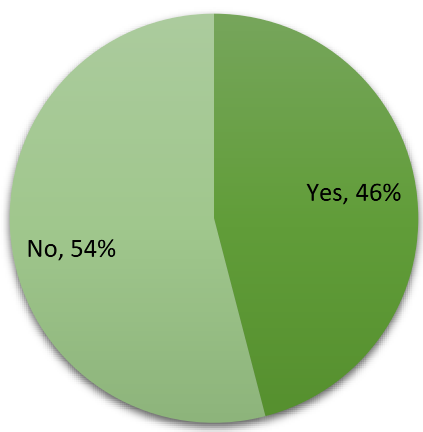
43% of respondents (15 businesses) indicated that their company's investment in their facility has increased over the past 18 months, while 54% or 19 businesses, indicated that the investment has stayed the same. Only one business (3%) indicated that investment in their facility has decreased over the same time period.

Figure 60: Historical Investment in facility (past 18 months)



Note: 35 respondents

Figure 61: Plans to expand within three years

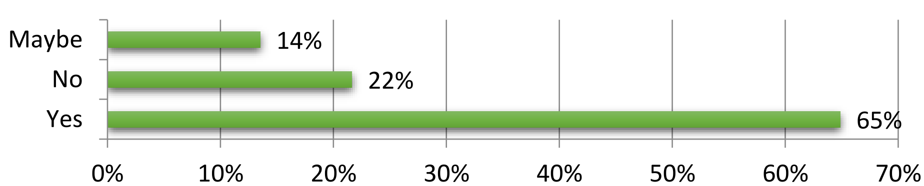


46% of respondents (17 businesses) plan to expand within three years, 54% (20 businesses) do not.

Note: 37 respondents

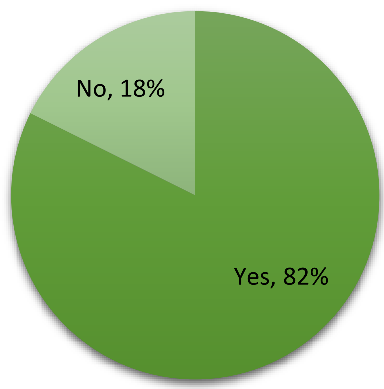
The majority of respondents indicated there *was* room for expansion at their site (65% or 24 businesses), while 22% (8 businesses) indicated that there *was not* room at their site.

Figure 62: Room for expansion



Note: 37 respondents

Figure 63: Adequacy of current site to support expansion

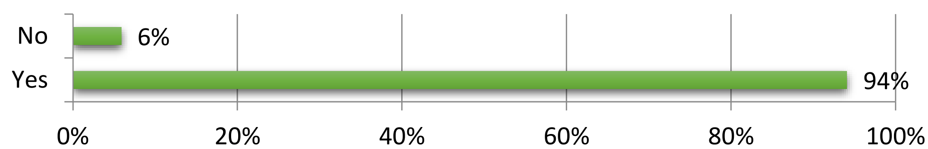


Of the 17 businesses planning expansion in the next three years, 82% (14 businesses) reported that their current site will be adequate.

Note: 17 respondents

The vast majority of respondents (94% or 16 businesses) indicated that expansion will occur within the community.

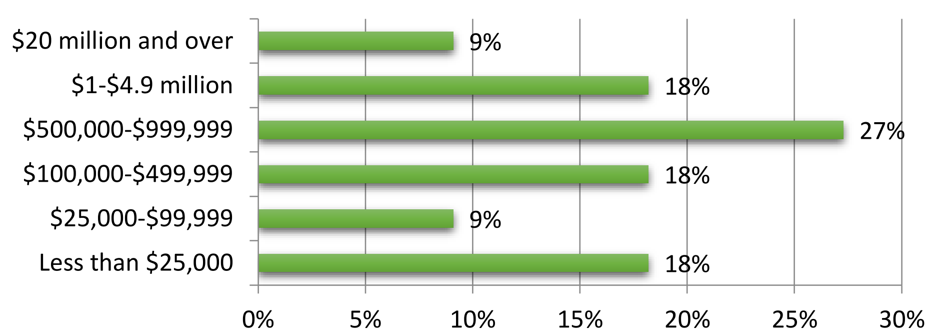
Figure 64: Expansion to occur in community



Note: 17 respondents

A substantial investment is planned for 1 business (9%), with a $20 million investment planned, while 2 businesses (18%) are planning investments in the range of $1 – $4.9 million. A total of 8 businesses (73%) are planning investments of less than one million dollars.

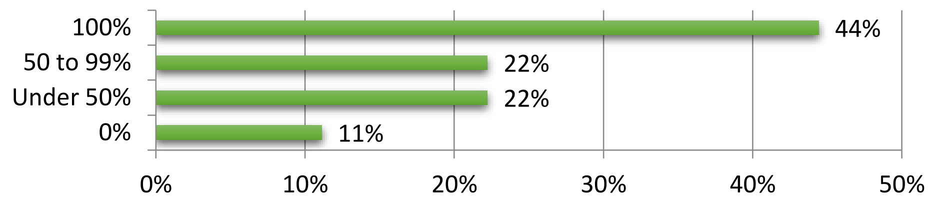
Figure 65: Estimated expansion investment



Note: 11 respondents

Of the 17 businesses planning expansion, 6 (66%) responded to state that they expect to spend over 50%of their expansion budget on equipment and technology, while 3 (33%) responded to indicate that 50% or less of their entire expansion budget will be devoted to equipment and technology.

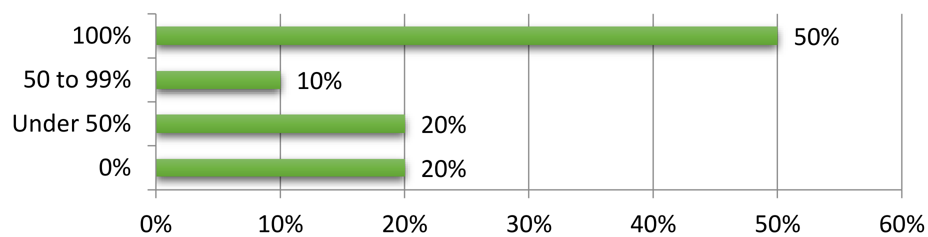
Figure 66: Component of expansion budget for equipment and technology



Note: 9 respondents

Of the 17 businesses planning expansion, 5 respondents (50%) expect to spend between 100% of their expansion budget on real estate, while an additional 5 respondents (50%) expect to spend a portion of the budget on real estate.

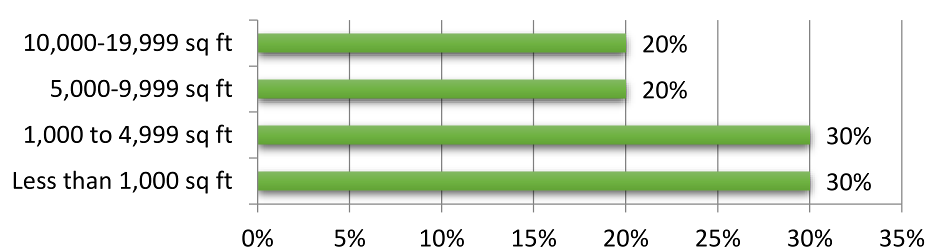
Figure 67: Component of expansion budget for real estate



Note: 10 respondents

Of the 17 possible respondents, 10 responses were provided. 2 respondents (20%) indicated that they expect the size of their facility expansion will be between 10,000 and 19,999 square feet. 3 reported (30%) their expansion would be less than 1,000 square feet.

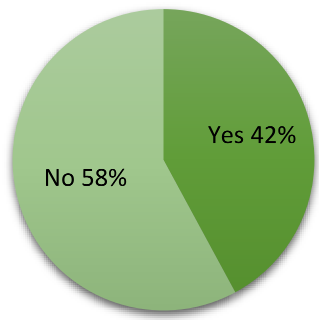
Figure 68: Size of facility expansion



Note: 10 respondents

Facility Upgrades

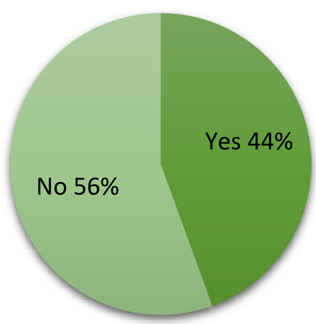
Figure 69: Recent facility upgrades



42% of businesses (8 businesses) indicated that there had been recent facility upgrades. Of those 8 businesses, 71% (5 businesses) indicated that those upgrades were completed in the last 12 months.

Note: 19 respondents

Figure 70: Planning facility upgrades

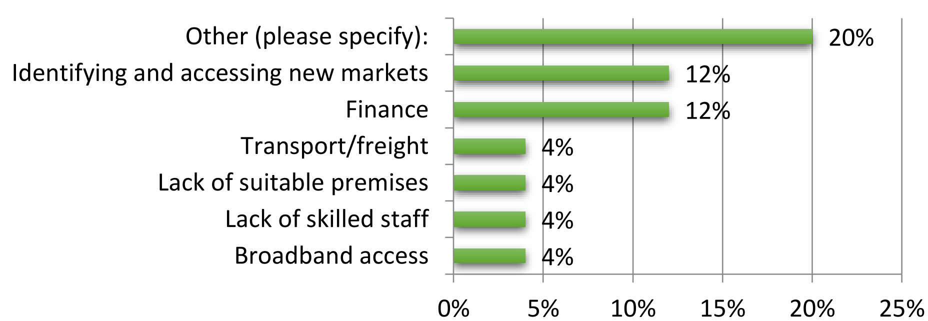


44% (8 businesses) indicated that they are planning facility upgrades, and that the majority (63% or 5 businesses) of those planning upgrades will occur in the next 12 months. Respondents were also asked to identify any barrier to upgrading, however no responses were provided.

Note: 18 respondents

Respondents cited a variety of factors that act as barriers to their expansion. Most common of those were identifying and accessing new markets (12% or 3 businesses), and finances (12% or 3 businesses). Other responses are listed in Appendix A.

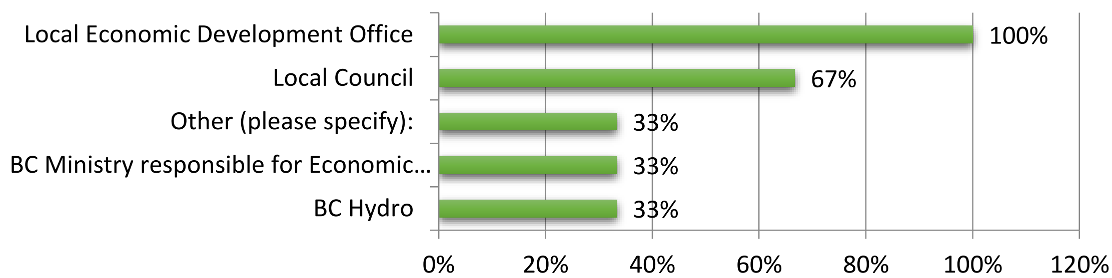
Figure 71: Barriers to expansion



Note: 25 respondents

9% of respondents (3 of 32 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest number (100% or 3 businesses) had approached the local economic development office, 67% (2 businesses) had approached their local Council, and 33% (1 business) had approached BC Hydro, the BC Ministry responsible for Economic Development and 'Other' respectively.

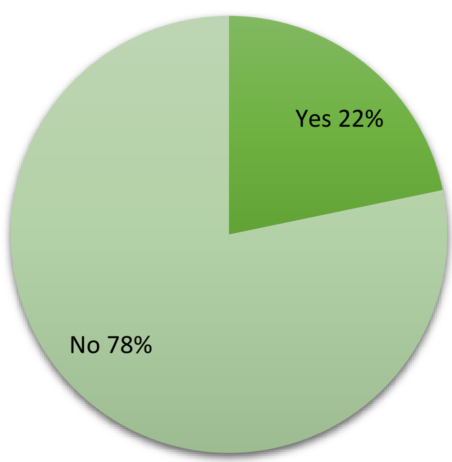
Figure 72: Organizations approached for expansion assistance



Note: 3 respondents

Energy Efficiency

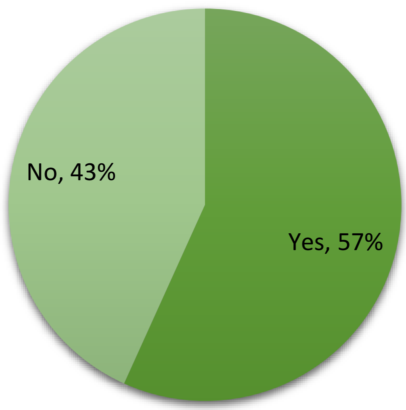
Figure 73: Considering energy efficiency in expansion plans



22% of those who responded (5 businesses) are considering energy efficiency in their expansion plans.

Note: 23 respondents

Figure 74: Awareness of BC Hydro Power Smart



57% of respondents (21 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

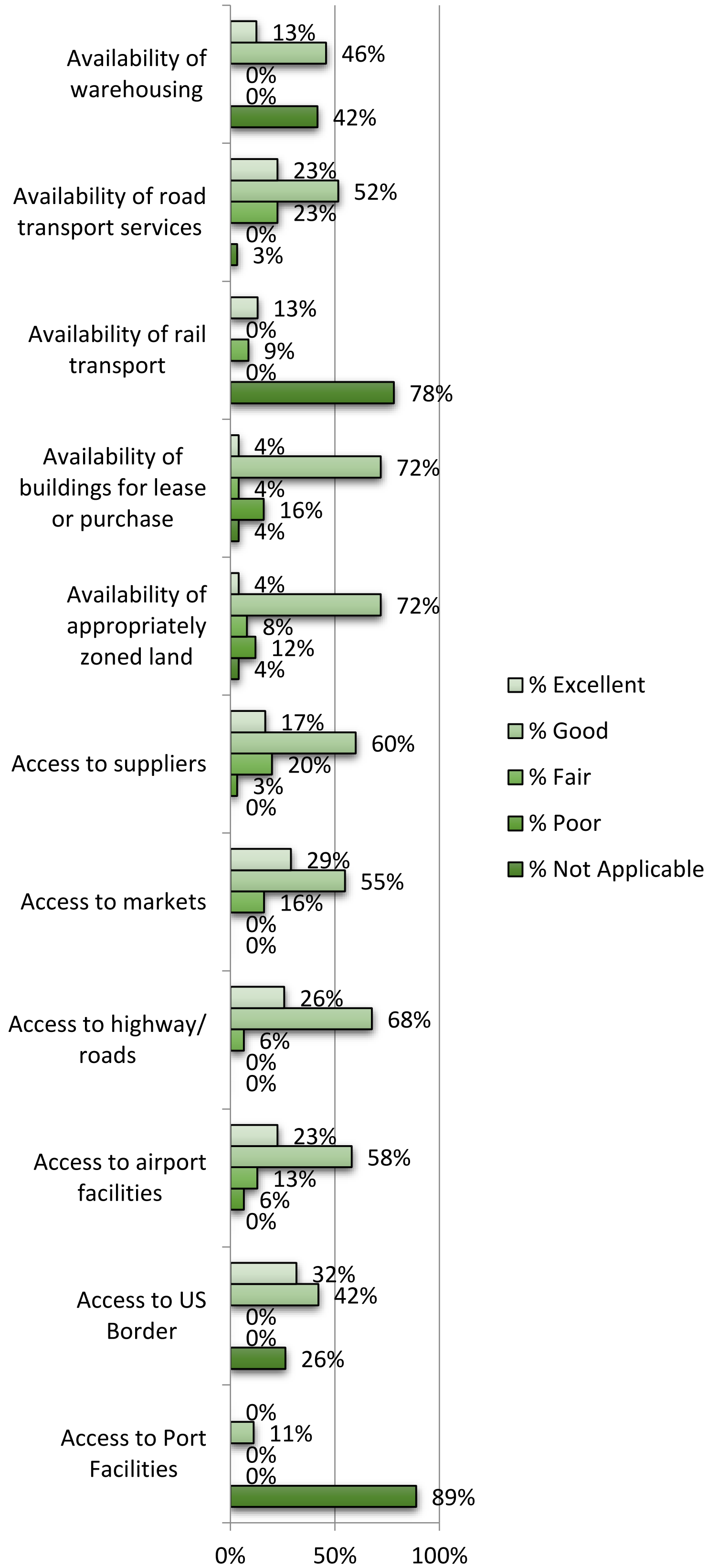
Note: 37 respondents

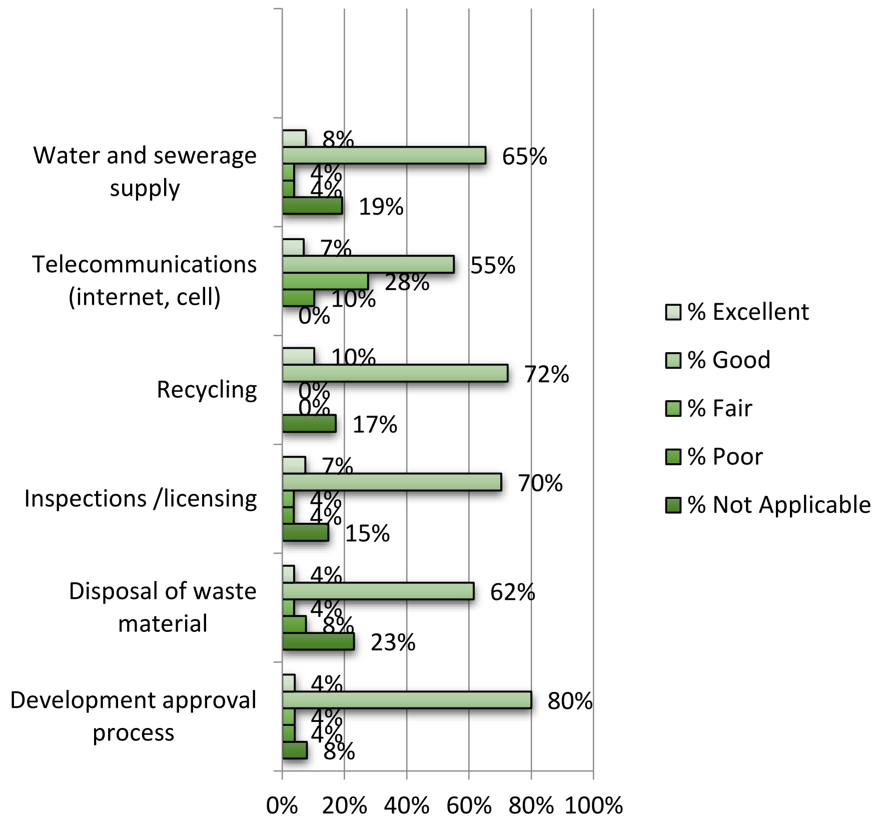
GOVERNMENT SERVICES

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 (16% or 4 businesses), availability of appropriately zoned land (12% or 3 businesses), and telecommunications (10% or 3 businesses).
- The services that received the highest number of **FAIR** ratings were telecommunications (28% or 8 businesses), availability of road transport services (23% or 7 businesses), and access to suppliers (20% or 6 businesses).
- The services that received the highest number of **GOOD** ratings were development approval process (80% or 20 businesses), recycling (72% or 21 businesses), availability of appropriately zoned land (72% or 18 businesses), and availability of buildings for lease or purchase (72% or 18 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to US border (32% or 6 businesses), access to markets (29% or 9 businesses) and access to highways/roads (26% or 8 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (89% or 16 businesses), availability of rail transport (78% or 18 businesses) and the availability of warehousing (42% or 10 businesses).

Figure 75: Rating of government services





Note: # of respondents varies

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 46% respondents (16 businesses) indicated they had suggestions. The highest number of responses (38% or 6 businesses) discussed improvements to expand telecommunication services (internet/cell phone/broadband/fiber/etc…). Increasing airport service (25% or 4 businesses) and improving airport service (13% or 2 businesses) were also mentioned.

Figure 76: Key words and responses in respondents' suggestions for improvements to government services

"Better internet service is very important."

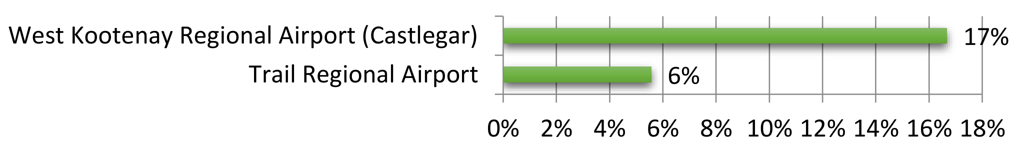
"Getting clients and workers from other offices in and out is difficult with challenging road access and air access."

"Better cell coverage would be good."

Airport Service

The West Kootenay Regional Airport (Castlegar) is the most used airport, with 17% of respondents (3 businesses) indicating they use that airport.

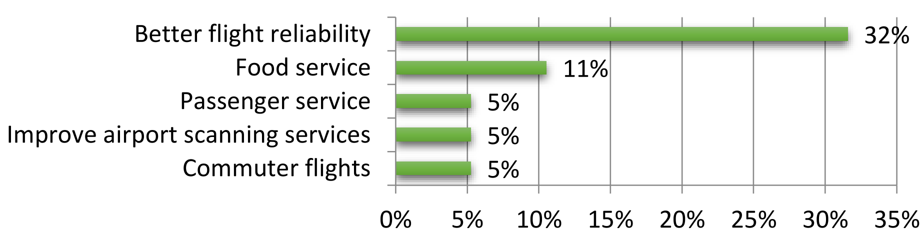
Figure 77: Airport service used



Note: 4 respondents

Respondents indicated that they would most like to see improved flight reliability (32% or 6 businesses), with 11% of respondents (2 business) each indicating a desire for food service.

Figure 78: New services at local airports



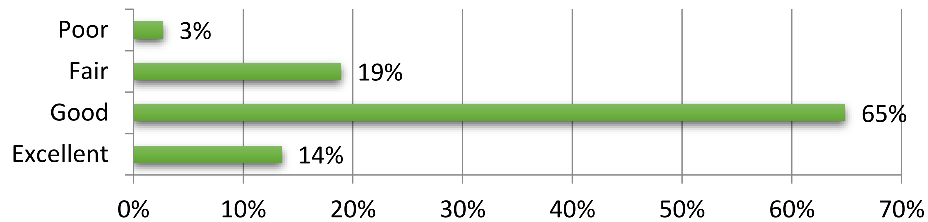
Note: 19 respondents

Business Climate

Quality of Business Climate

The majority of responses rated the overall business climate as good (65% or 24 businesses).

Figure 79: Rating of local business climate

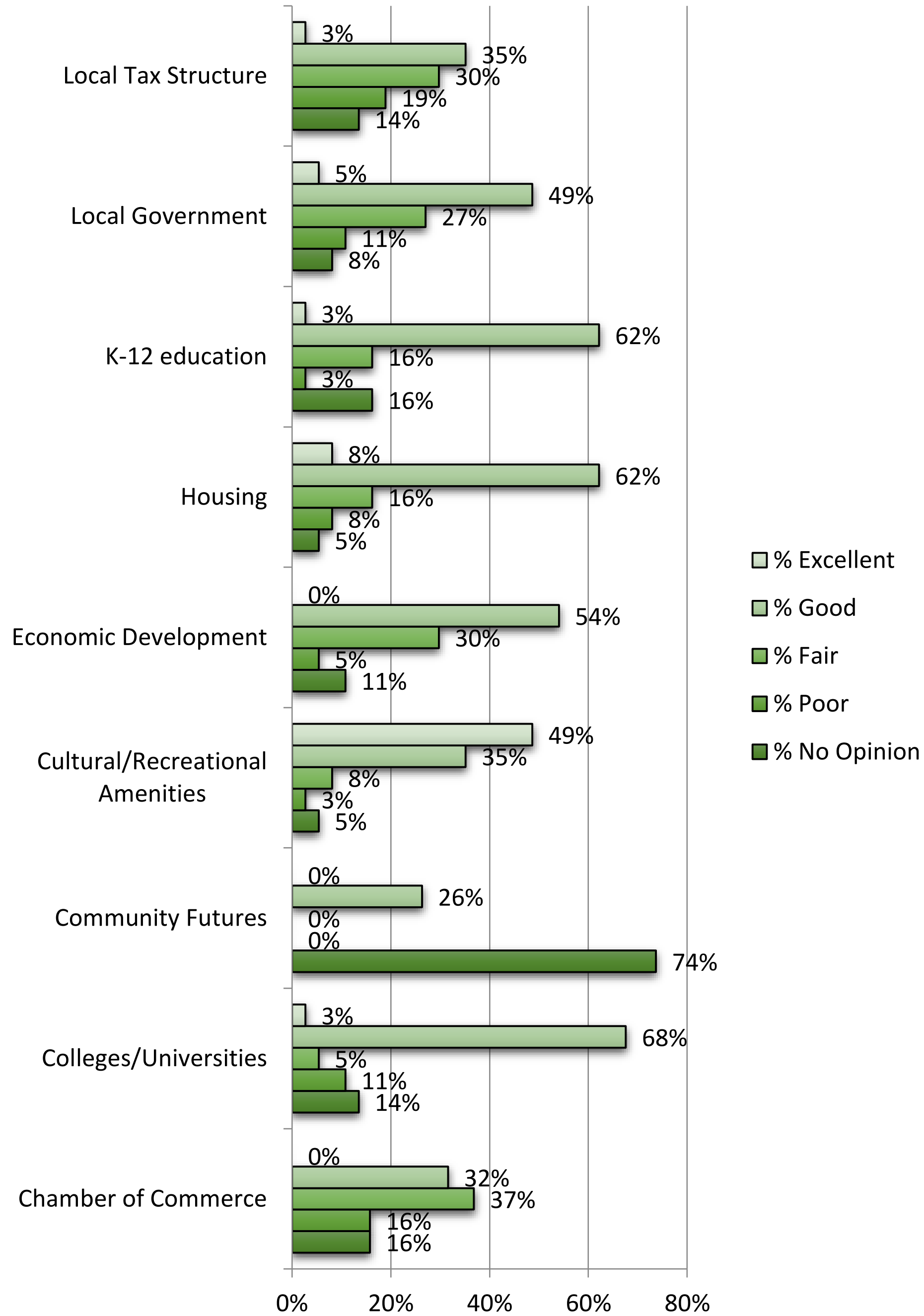


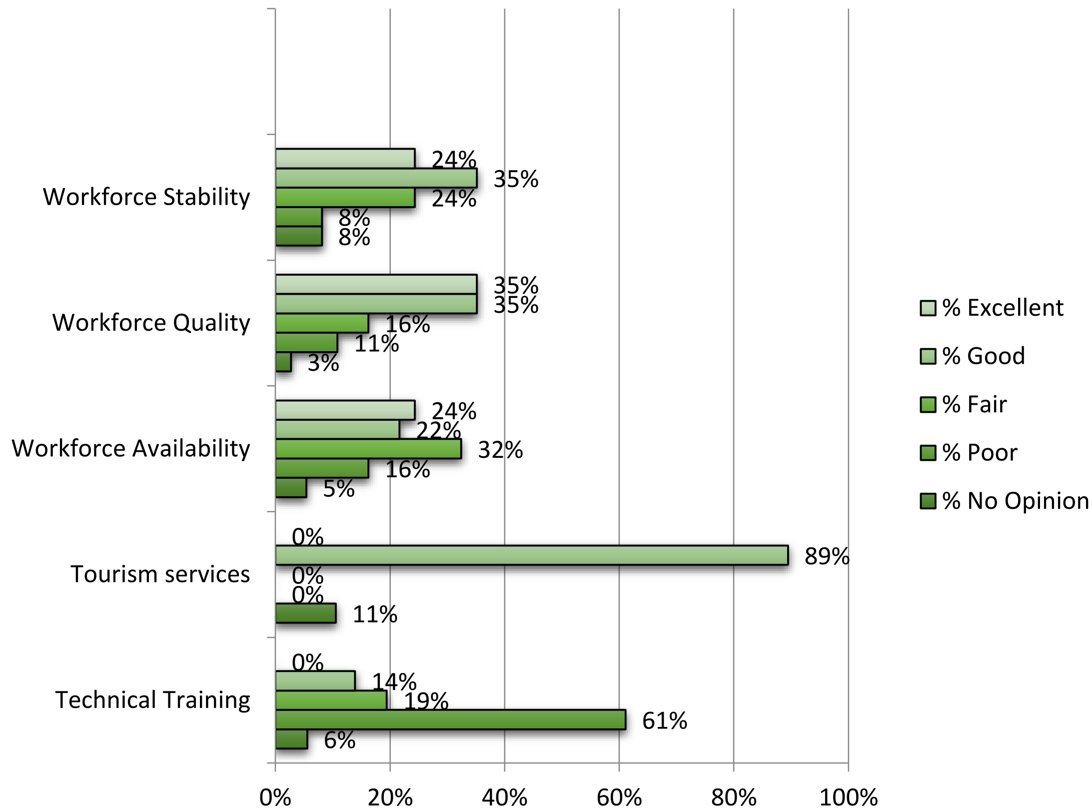
Note: 37 respondents

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 technical training (61% or 22 businesses) and local tax structure (19% or 7 businesses).
- The factors that received the highest number of **FAIR** ratings included Chamber of Commerce (37% or 7 businesses) and the workforce availability (32% or 12 businesses).
- The factors that received the highest number of **GOOD** ratings included tourism services (89% or 17 businesses) and colleges/universities (68% or 25 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included cultural/recreational amenities (49% or 18 businesses) and workforce quality (35% or 13 businesses).
- The factors that received the highest number of **NO OPINION** ratings include the Community Futures (74% or 14 businesses), and Chamber of Commerce (16% or 6 businesses), and K-12 education (16% or 6 businesses).

Figure 80: Rating of business climate factors

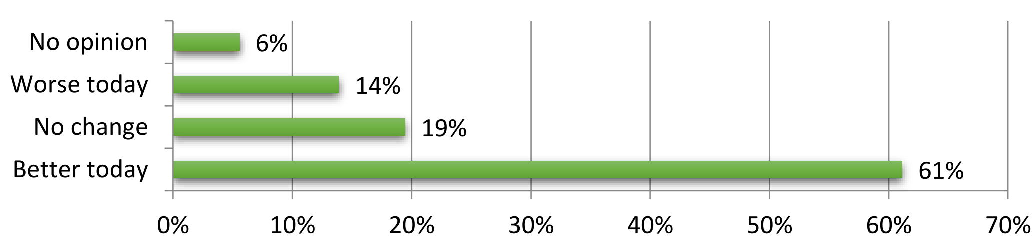




Note:# of respondents varies

61% of respondents (22 businesses) felt that the business climate is better today than it was 5 years ago. 14% (5 businesses) thought that it is worse, and 19% (7 businesses) believed there was no change in the business climate. Reasons given for the business climate being worse off include declining economy, more competition, and businesses closing.

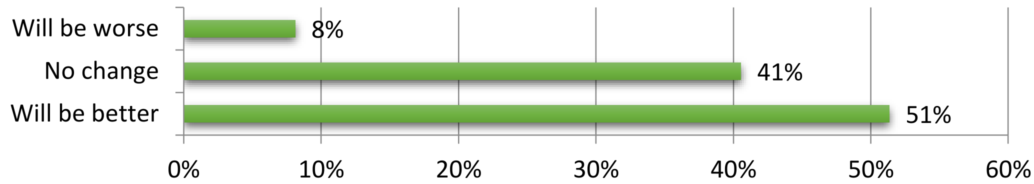
Figure 81: Business climate today vs. 5 years ago



Note: 36 respondents

51% of respondents (19 businesses) expect that the business climate will be better 5 years from today. 8% (3 businesses) expect that it will be worse.

Figure 82: Business climate 5 years from today

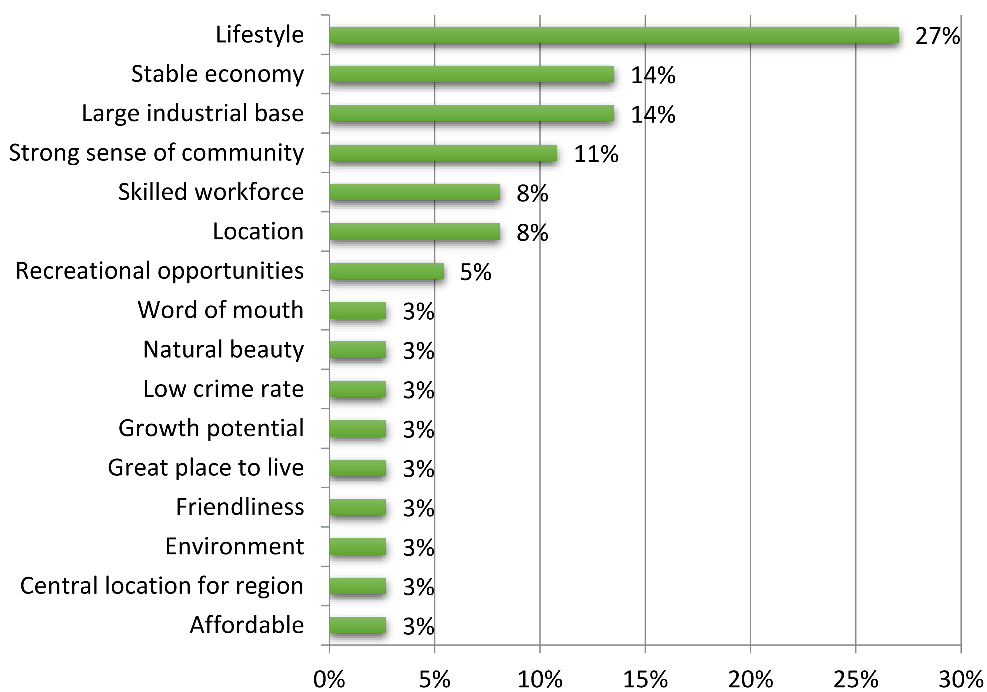


Note: 37 respondents

Strengths and Weaknesses of Business Climate

41 responses were provided when 37 respondents were asked to list the community's strengths as a place to do business; the highest number of responses (27% or 10 responses) cited the area's lifestyle as the community's strength. 14% (5 businesses) indicated the stable economy, and 14 % (5 businesses) indicated the large industrial base were factors in the community's strength as a place to do business.

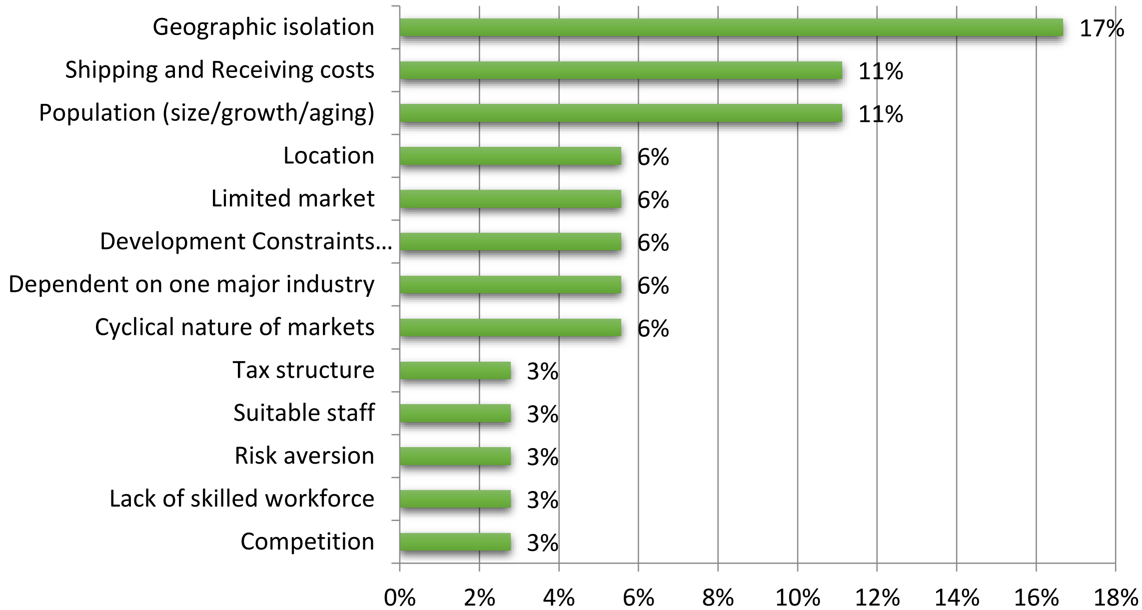
Figure 83: Community's strengths as a place to do business



Note: 37 respondents

29 responses were provided when respondents were asked to list the community's weaknesses as a place to do business; the highest number of responses (17% or 6 respondents) was the geographic isolation. Shipping and Receiving costs along with the size, growth and aging population accounted for 11% of responses (4 businesses) respectively.

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

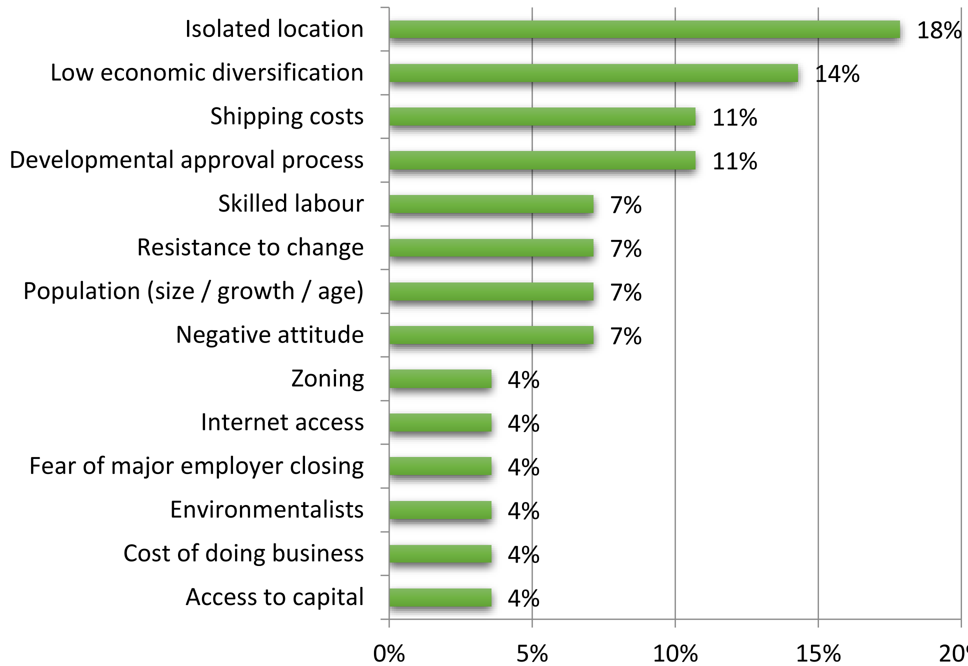


Note: 36 respondents

Business Growth

76% of respondents (28 businesses) indicated that there are barriers to growth. The highest number of respondents (18% or 5 businesses) stated that the isolated location is an important barrier to growing the community's economy. Other commonly cited barriers include low economic diversification (14% or 4 businesses), shipping costs and the developmental approval process (11% or 3 businesses) respectively.

Figure 85: Barriers to growth in the community



Note: 28 respondents

The following excerpts illustrate the barriers cited:

> *"There are few secondary businesses serving the other businesses in the area. That is a big area they see for growth."*

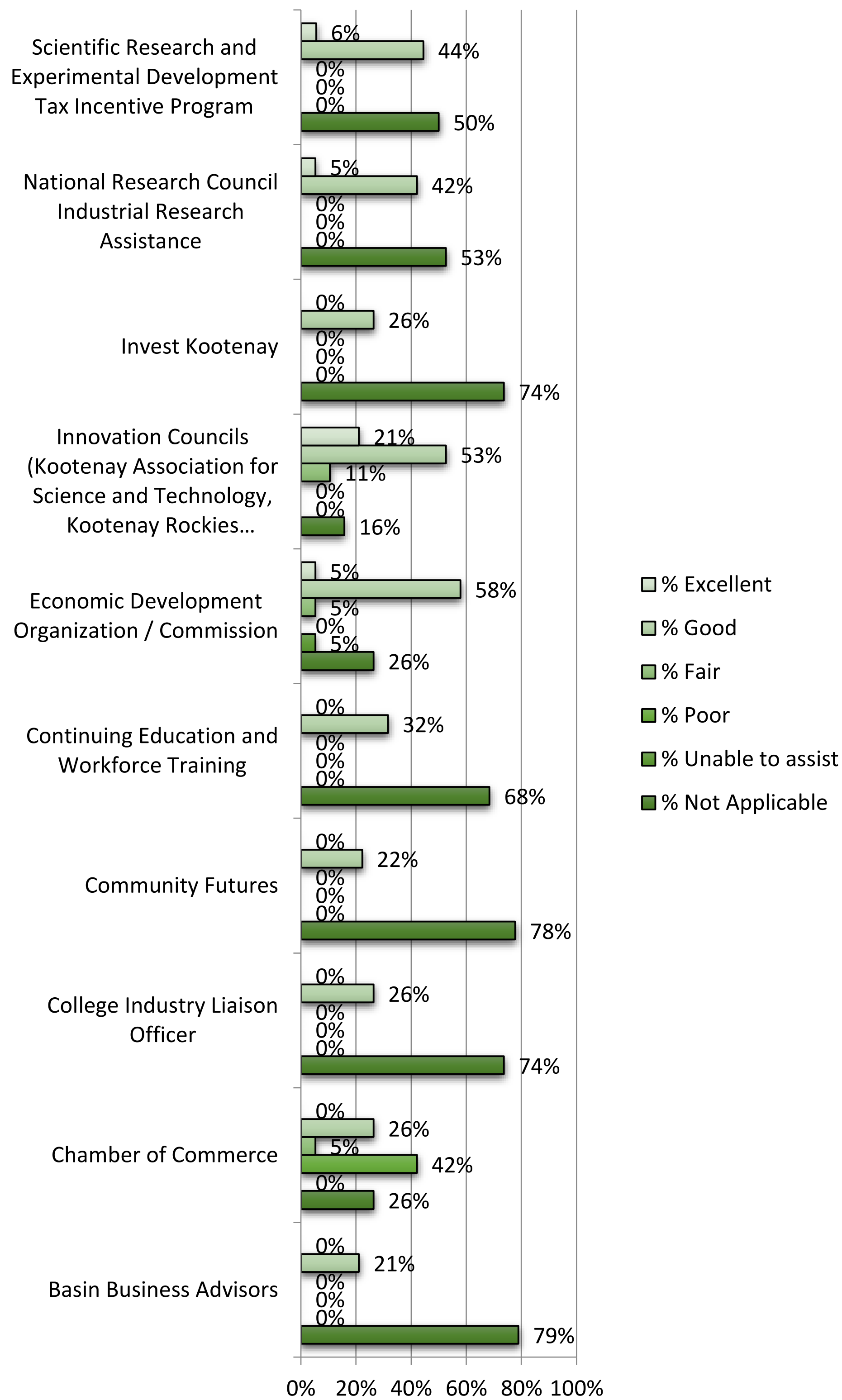
> *"The previous generation is now retiring and for 30 years didn't hire anyone or have succession plans and are now closing."*

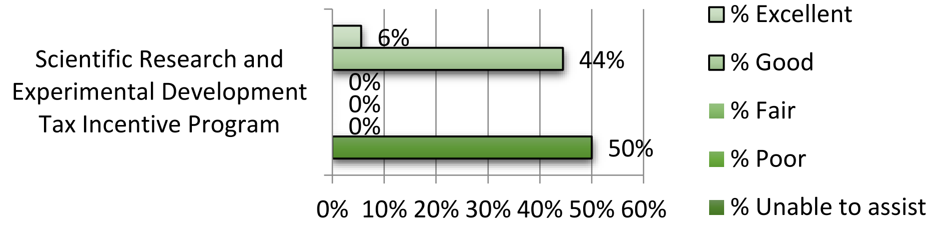
> *"Lack of available trained trades workers. Lack of professionals and local technical training opportunities - have to send people out of the region to get trained in the trades."*

> *"There is a sense that things are always on the verge of collapse. Would like the area to have a sense that everyone is doing OK. Always hear that it's a great place to live but...... Get rid of the but."*

Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest Poor response (42% or 8 businesses). The highest Excellent response was for the Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council) (21% or 4 businesses). The Innovation Councils (53% or 10 businesses), Economic Development Organization/Commission (58% or 11 businesses), National Research Council Industrial Research Assistance (42% or 8 businesses), and the Scientific Research and Experimental Development Tax Incentive Program (44% or 8 businesses) all received high responses delivering a good level of service.

Figure 86: Level of service from business support providers

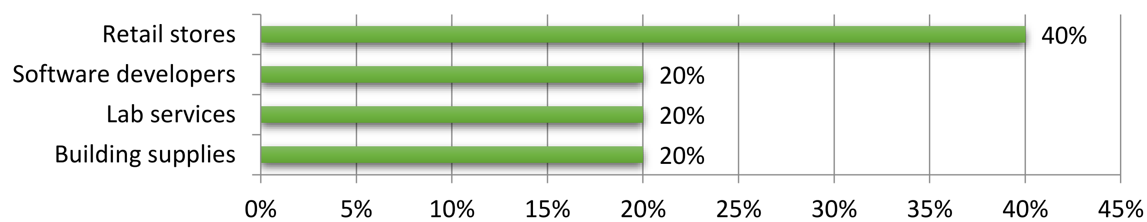




Note: # of respondents varies

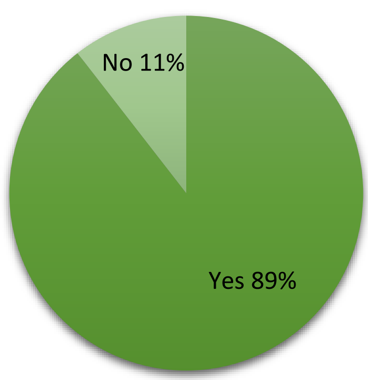
16% of respondents (6 businesses) indicated that there are suppliers that could locate in the region, while 84% (31 businesses) believed there were not. Of those potential suppliers, retail stores were most commonly cited by 40% (2 respondents).

Figure 87: Potential Suppliers



Note: 5 respondents

Figure 88: Supply to local companies

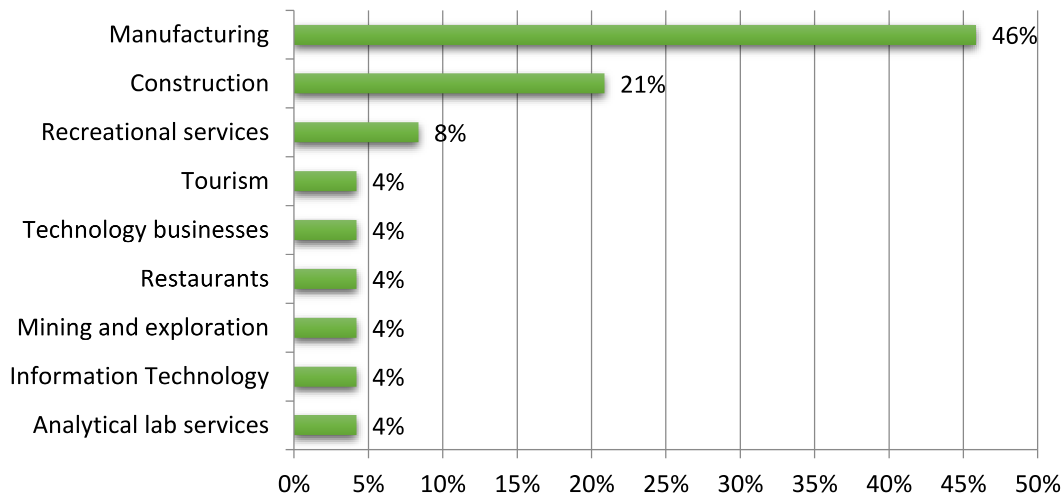


89% of respondents (17 businesses) indicated that they do supply products or services to companies located in the community or region.

Note: 19 respondents

Manufacturing (46% or 11 respondents), Construction (21% or 5 respondents), and Recreational Services (8% or 2 respondents), were the most frequently cited businesses/sectors identified that would strategically benefit the respondents.

Figure 89: Sectors, businesses or industries that would strategically benefit you or the industry

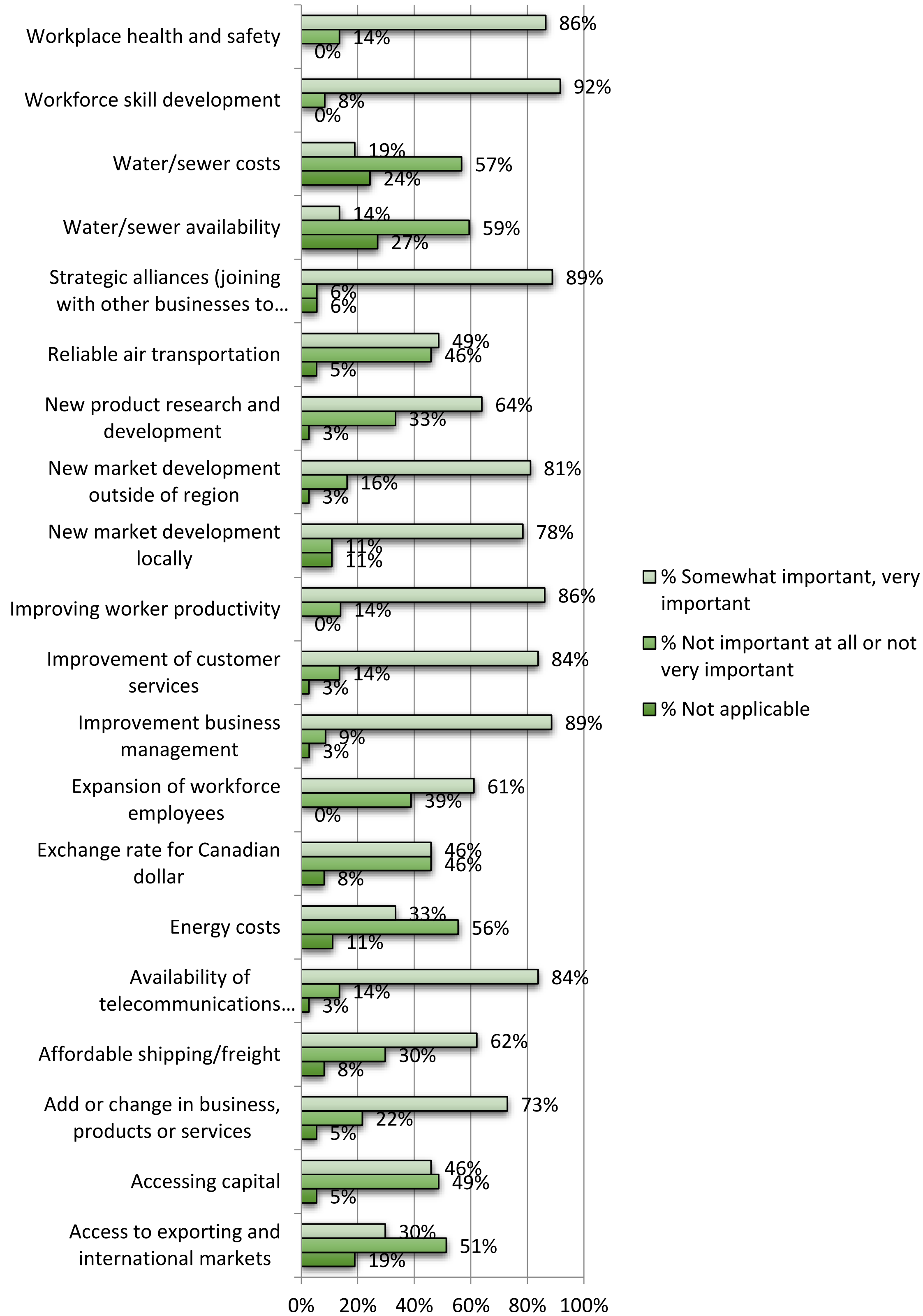


Note: 24 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include workforce skill development (92% or 33 businesses), Strategic alliances (joining with other businesses to provide products/services)(89% or 32 businesses) and Improving business management (89% or 31 businesses).

Figure 90: Importance of business competitiveness factors

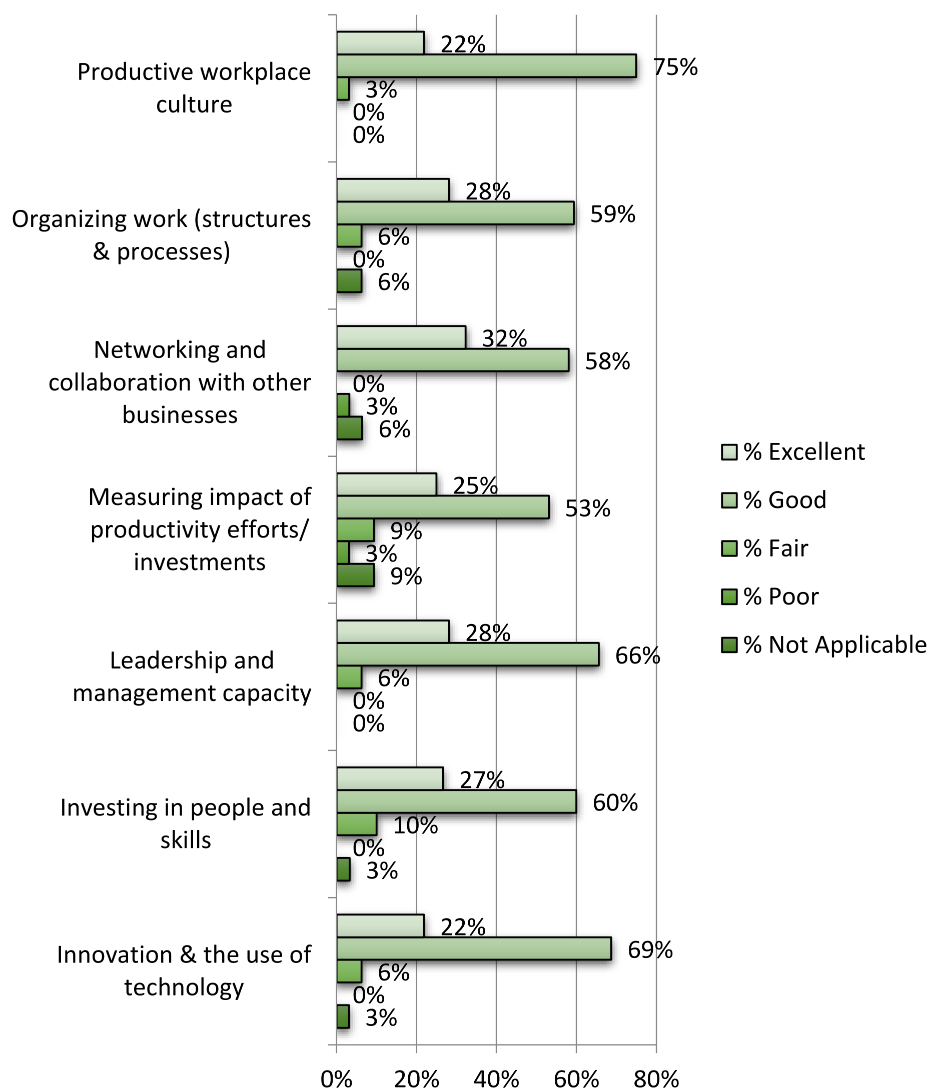


Note: # of respondents varies

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

- **EXCELLENT** ratings include Networking and collaboration with other businesses (32% or 10 businesses), leadership and management capacity, and Organizing work (structures & processes) (28% or 9 businesses) respectively;
- **GOOD** ratings include Productive workplace culture (75% or 24 respondents) and Innovation & the use of technology (69% or 22 businesses);
- **FAIR** ratings include Investing in people and skills (10% or 3 businesses) and Measuring impact of productivity efforts/ investments (9% or 3 businesses); and
- **POOR** ratings include measuring impact of productivity efforts/investments and Networking and collaboration with other businesses (3% or 1 businesses).

Figure 91: Performance on key productivity drivers

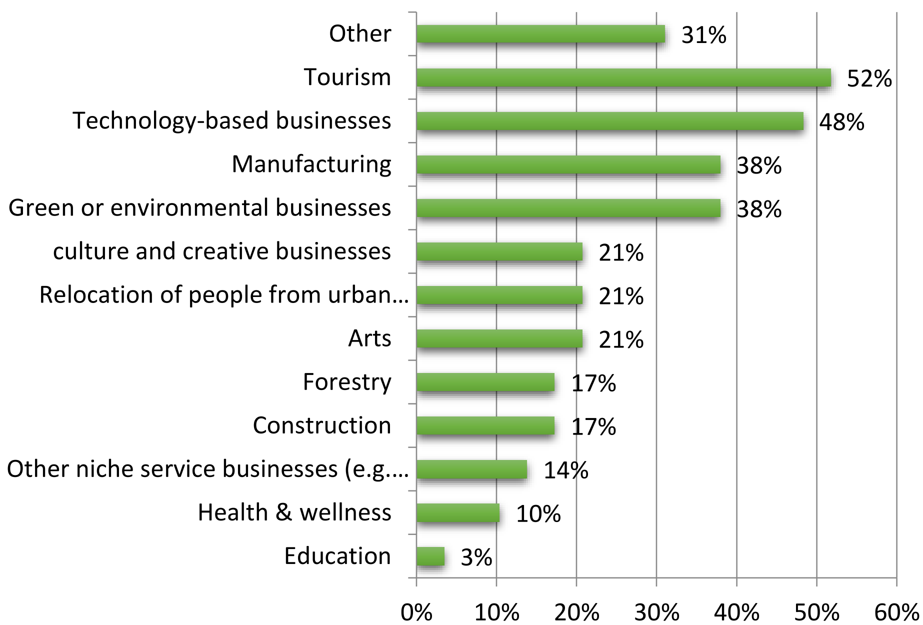


Note: # of respondents varies

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (52% or 15 businesses), technology based businesses (48% or 14 businesses), manufacturing and green or environmental businesses (38% or 11 businesses respectively). For a list of economic drivers identified as "Other", refer to Appendix A.

Figure 92: Economic drivers with greatest growth potential



Note: 29 respondents

Proximity to Alberta

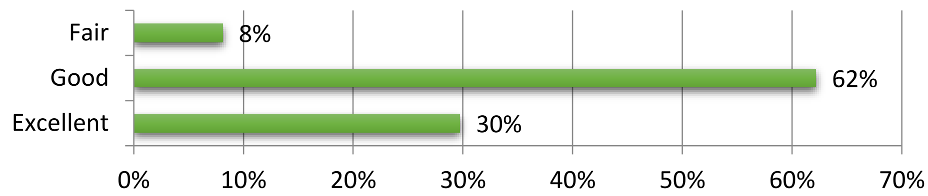
None of the respondents (0%) surveyed reported that they were impacted by their proximity to Alberta.

Assessment and Plans

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (62% or 23 businesses), 30% (11 businesses) reported that their company's health is excellent and 8% (3 businesses) reported that it is fair. It is worth noting that no respondents indicated that their company is in poor health.

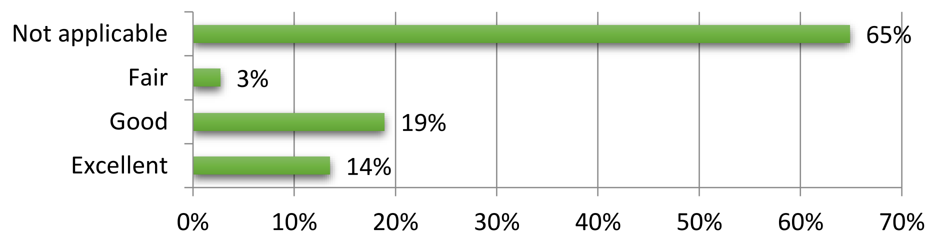
Figure 93: Facility’s overall health



Note: 37 respondents

Most businesses with a parent company indicated that the health of that parent company is either good (19% or 7 businesses) or excellent (14% or 5 businesses).

Figure 94: Overall health of parent company

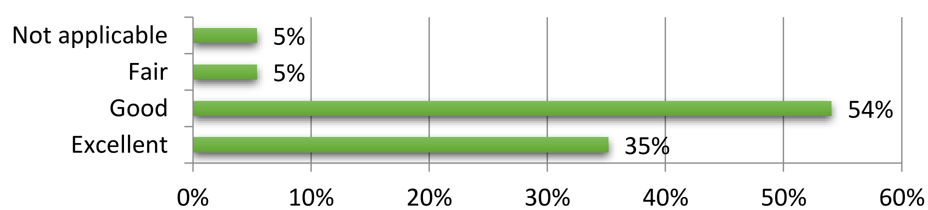


Note: 37 respondents

Attitude toward Community

54% of respondents (20 businesses) indicated that their local management’s attitude toward the community is good and 35% (13 businesses) indicated that it is excellent.

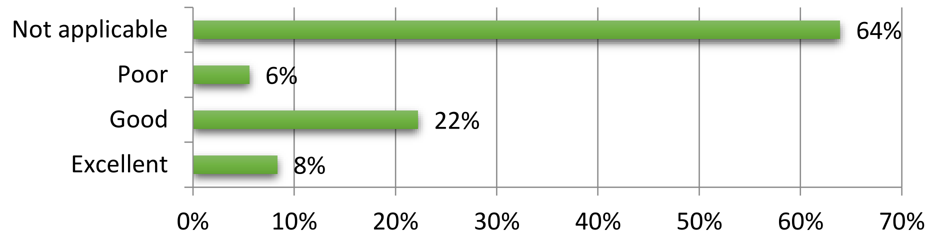
Figure 95: Local management's attitude toward community



Note: 37 respondents

The highest number of respondents (22% or 8 businesses) indicated that their parent company’s attitude toward the local community is good.

Figure 96: Parent company's attitude toward local community



Note: 36 respondents

Risk of Closing or Downsizing

All of the businesses surveyed indicated that the risk of businesses closing or downsizing within the next three years is low.

RECOMMENDATIONS

NEXT STEPS

The results of this survey can be used by economic development organizations in the mining and metallurgical sector within the Kootenay/Boundary region 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").

Patience and a commitment over the long-term are critical in determining the success of these initiatives. For this reason, BRE should be thought of, and implemented as, an on-going process as opposed to a one-time project. The LCDDTS Metallurgical Committee and KAST are urged to share this report with their jurisdiction's local governments for their consideration.

BRE results can form the backbone of an economic development strategy.

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. Use the existing Metallurgical network and the newly formed MIDAS Centre 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. Ensure a performance measurement framework is in place to assess the impact of implementation efforts.

Potential Action Areas

Local Workforce

The mining and metallurgical sector in the Kootenay/Boundary region employs a total of 2,716 employees. The vast majority (86%) of employees are full-time and live within the community in which they work. 62% of all employees are considered skilled/professional, with just 3% considered entry-level positions. Combined with the skills gaps indicated in the recruitment data, we see an indication that the industry could benefit from coordinated recruitment activities outside of the region. Interestingly, child care was the issue of most critical importance to their employees, with transportation and the cost of living following closely at 31%. Actions related to this theme include working with the various levels of government to address the concerns of local employees, promoting the value the industry contributes to local communities, and aggressive recruitment/marketing outside of the region.

Innovation

The ability for companies to remain relevant and competitive through awareness of new technologies and business practices is critical. This is especially so for the continued development of a healthy mining sector in the Kootenay/Boundary region. Yet 55% were not aware of any anticipated trends, technologies or significant changes that will occur in the industry that would require new skills, 39% did not believe there were any areas for new training in the next five years. Others, however, indicated emerging technologies (28%), product training (17%) and emerging industry practices (17%) were areas where new training should be considered. As a sector influenced by global economic conditions, remaining current with global trends and innovations is critical as is ensuring employees have the necessary skills for companies to remain competitive and relevant. Actions include convening industry networks to discuss and share information on emerging technologies and industry practices. The new MIDAS centre would be ideal for this function. Further, promotion of the full package of MIDAS centre services and supports should be performed to lower barriers to innovation for the region's industry.

Training & Skill Development

The majority of businesses (67%) indicated that they do maintain a training budget to upgrade employee skills, and yet 61% of businesses indicated that the climate for technical training was poor. Findings indicate that they have a preference for classroom sessions (84%), online webinars (63%), or individual coaching (32%) style formats. 92% of businesses indicated that workforce skill development was of highest importance for ensuring future business competitiveness. Future initiatives could include supporting and/or developing a network to help businesses identify shared training needs, promoting and/or developing training opportunities, and working with educational institutions to ensure local skill requirements are considered in programming.

Youth Employment

Findings indicate that employees under the age of 26 are in the minority. Increasing youth involvement in the local workforce could be encouraged. Actions on this theme could involve gaining a better understanding of the reasons for the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions. This may assist in addressing the recruitment challenges that 43% of businesses report having.

Business Growth & Expansion

53% of businesses in the region report being in a growth cycle, and 46% indicate that they are planning to expand within the next three years. The majority of those businesses planning to expand do feel their existing site is adequate (82%), and the majority of expansion plans are expected to occur within the community (94%). Of the barriers to expansion mentioned, identifying and accessing new markets (12%), as well as financing (12%) were most commonly referenced. Barriers to growth more generally included the isolated location (18%) and low economic diversification (14%). Businesses also report that employment rates are generally stable or increasing, and that 62% of businesses anticipate an increase to the amount of full-time employment over the next three years. This data coupled with the general positive business climate (65% rate the local business climate as 'good') and the optimism for the future provides a positive report on local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of direct support in navigating local regulations, identifying new markets, accessing financing, and connecting businesses with resources to assist in expansion projects. It is worth noting that very few businesses (9%) sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local support providers approach businesses proactively to understand barriers and work collaboratively towards solutions.

Economic Diversification

Low levels of economic diversification was identified as a barrier to growth by some respondents, as well as the challenges of a geographically remote location, this is this is supported by the fact that the largest percentage of respondents indicated that between 76 – 100% of their sales are generated by their top three customers. . The industry is highly dependent on Teck Trail Operations, in the local mining sector. Businesses identified manufacturing, construction, and recreational services as the most important sectors to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, technology based businesses, manufacturing, and green or environmental businesses. Actions to increase the diversification could include working with local businesses to identify new markets locally and elsewhere, and assessing new technologies, particularly green/environmental technologies as it relates to the mining industry. Continued collaboration between various levels of government, economic development practitioners, post-secondary institutions, and local businesses towards a diversified economy will be key to achieving results in this area. With the majority of businesses indicating an overall good business climate, there is much positive support to build on the work already occurring in this area.

Supply Sourcing

The data indicates that the majority of supplies come from outside the local region, but that there exists a strong practice of sourcing local supplies, with 47% of businesses indicating they are able to source their supplies locally. The most common response (88%) for the reason why supplies are sourced outside of the local area is that they are not available locally. There is an opportunity to engage in discussion with businesses in the sector 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. Supply chain analysis and gap analysis may provide information to the business network that may facilitate existing businesses, or new entrants, to move into the supply chain gaps. A potential spin off effect could be the diversification of the local economy.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 22% of respondents indicated that they have a formal succession plan and less than half have an up-to-date business plan. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses. Any future planning initiatives should be aggressively advertised to ensure uptake among businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Appendix A: Data Tables

Company Information

Figure 1: Industry Classification	NAICS	Count	Percent of Question Respondents
Construction	23	8	20.00%
Manufacturing	31-33	12	30.00%
Retail and Wholesale Trade	41-45	2	5.00%
Transportation and Warehousing	48-49	2	5.00%
Information and Cultural Industries	51	1	2.50%
Real Estate and Rental and Leasing	53	1	2.50%
Professional, Scientific and Technical Services	54	9	22.50%
Administrative Support, Waste Management and Remediation	56	4	10.00%
Educational Services	61	1	2.50%
Total		40	100.00%

Survey Participants:	40
Question Respondents:	40
No Response Count:	0
Response Rate:	100%

Figure 2: Functions located at this facility	Count	Percent of Question Respondents
Warehousing	6	16.22%
Distribution	9	24.32%
Manufacturing	14	37.84%
Engineering/RD	22	59.46%
Headquarters	25	67.57%
Services	32	86.49%
Total	108	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 3: Who are your competitors?: Where are your competitors located?	Count	Percent of Question Respondents
In Canada	2	11.11%
Outside Canada	3	16.67%
In Region	6	33.33%
In Province	8	44.44%
None	1	5.56%
Total	20	

Survey Participants:	40
Question Respondents:	18
No Response Count:	22
Response Rate:	45%

Figure 4: What are the factors that make your company successful here?	Count	Percent of Question Respondents
Adaptability	1	2.56%
Competitive pricing	1	2.56%
Customer loyalty	1	2.56%
Demand for products and services	1	2.56%
Networking	1	2.56%
Niche product	1	2.56%
Established business	2	5.13%
Hard work	2	5.13%
Technical expertise	2	5.13%
Customer service	3	7.69%
Lack of competition	3	7.69%
Workforce	3	7.69%
Experience	4	10.26%
Knowledgeable staff	4	10.26%
Quality product / service	5	12.82%
Reputation	6	15.38%
Location	8	20.51%
Total	48	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 5: Why did you choose this community to locate your business?	Count	Percent of Question Respondents
Born and raised here	1	5.00%
Lifestyle	3	15.00%
Already living here	5	25.00%
Business opportunity	5	25.00%
Location	10	50.00%
Total	24	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Figure 6: Does this company have another location elsewhere?	Count	Percent of Question Respondents
Yes	15	40.54%
No	22	59.46%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 7: Does this company have another location elsewhere?: If *Yes*, where?	Count	Percent of Question Respondents
Outside Canada	2	25.00%
Elsewhere in nation	3	37.50%
In Province	7	87.50%
Total	12	

Survey Participants:	40
Question Respondents:	8
No Response Count:	7
Parent Question 'Yes' Respondents:	15
Parent Question Respondents:	37
Response Rate:	53%

Figure 8: Location of company's headquarters	Count	Percent of Question Respondents
Outside Canada	2	5.26%
Elsewhere in nation	6	15.79%
In Province	30	78.95%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 8b: Location of company's headquarters: Province	Count	Percent of Question Respondents
AB	1	5.00%
ON	2	10.00%
QC	3	15.00%
BC	14	70.00%
Total	20	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Figure 8c: Location of company's headquarters: Province	Count	Percent of Question Respondents
United Kingdom	1	4.55%
United States	1	4.55%
Canada	20	90.91%
Total	22	

Survey Participants:	40
Question Respondents:	22
No Response Count:	18

Response Rate:	55%

Figure 8d: Corporate headquarters location, if different than local location	Count	Percent of Question Respondents
AB	1	14.29%
Edmonton	1	14.29%
Kelowna BC	1	14.29%
Nanaimo BC	1	14.29%
Vancouver BC	4	57.14%
Total	8	

Survey Participants:	40
Question Respondents:	7
No Response Count:	33
Response Rate:	18%

Figure 9: Life cycle stage of firm's primary product/service	Count	Percent of Question Respondents
Declining	1	2.56%
Emerging	2	5.13%
Growing	21	53.85%
Maturing	15	38.46%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 10: How long has this facility operated	Count	Percent of Question Respondents
<1 Year	2	5.26%
1-4 Years	4	10.53%
5-9 Years	5	13.16%
10-19 Years	12	31.58%
>20 Years	15	39.47%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 11: What is this company's ownership status?	Count	Percent of Question Respondents
Publicly owned	5	12.82%
Privately owned	34	87.18%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 11b: What is this company's legal status?	Count	Percent of Question Respondents
Partnership	1	2.56%
Limited liability partnership (LLP)	2	5.13%
Sole proprietorship	6	15.38%
Corporation	30	76.92%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 12: Has the local facility changed owners or managers in the past 5 years?	Count	Percent of Question Respondents
Yes	17	43.59%
No	22	56.41%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 12b: If *Yes*, describe the local impact of the change	**Count**	**Percent of Question Respondents**
Neutral	1	6.25%
Positive	15	93.75%
Total	16	

Survey Participants:	40
Question Respondents:	16
No Response Count:	1
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	39
Response Rate:	94%

Figure 13: If *Yes* what is the anticipated time frame	**Count**	**Percent of Question Respondents**
2 years	1	25.00%
3 years or more	3	75.00%
Total	4	

Survey Participants:	40
Question Respondents:	4
No Response Count:	0
Parent Question 'Yes' Respondents:	4
Parent Question Respondents:	36
Response Rate:	100%

Figure 13b: Is an ownership change pending for this facility?	**Count**	**Percent of Question Respondents**
Yes	4	11.11%
No	32	88.89%

Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Figure 14: If *Yes*, how do you intend to exit the business?	**Count**	**Percent of Question Respondents**
Sell to another company	1	25.00%
Sell/transfer to a non-family member	1	25.00%
Other	2	50.00%
Total	4	

Survey Participants:	40
Question Respondents:	4
No Response Count:	0
Parent Question 'Yes' Respondents:	4
Parent Question Respondents:	36
Response Rate:	100%

Figure 14b: If *Yes*, how do you intend to exit the business?: If *other*, please explain	**Count**	**Percent of Question Respondents**
Don't know	1	25.00%
Employee share purchase plan	1	25.00%
Total	2	

Survey Participants:	40
Question Respondents:	2
No Response Count:	0
Parent Question 'Other' Respondents:	2
Parent Question Respondents:	4
Response Rate:	100%

Figure 15: Is there a formal succession plan?	Count	Percent of Question Respondents
Yes	9	23.68%
No	29	76.32%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 15b: Have you identified a successor to your business?	Count	Percent of Question Respondents
Yes	7	18.92%
No	30	81.08%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 15c: If *Yes*, have you been assisted in preparation of a succession plan?	Count	Percent of Question Respondents
Yes	3	60.00%
No	2	40.00%
Total	5	

Survey Participants:	40
Question Respondents:	5
No Response Count:	4
Parent Question 'Yes' Respondents:	9
Parent Question Respondents:	38
Response Rate:	56%

Figure 15d: If Yes, by whom	Count	Percent of Question Respondents
Business partner	1	33.33%
Accountant	2	66.67%
Total	3	

Survey Participants:	40
Question Respondents:	3
No Response Count:	0
Parent Question 'Yes' Respondents:	3
Parent Question Respondents:	5
Response Rate:	100%

Figure 16: Does this firm have a current written business plan?	Count	Percent of Question Respondents
Yes	15	41.67%
No	21	58.33%
Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Local Workforce

Figure 17b: Total number of employees at this facility*: Total employees	Count	Percent of Question Respondents
Less than 5	9	22.50%
5-9	9	22.50%
10-19	5	12.50%
20-49	10	25.00%
50-99	1	2.50%
Over 100	6	15.00%
Total	40	

Total employees:	2921

Survey Participants:	40
Question Respondents:	40
No Response Count:	0
Response Rate:	100%

Figure 17b: Total number of employees at this facility*: Full-time employees	Count	Percent of Question Respondents
Less than 5	13	32.50%
5-9	9	22.50%
10-19	3	7.50%
20-49	9	22.50%
50-99	3	7.50%
Over 100	3	7.50%
Total	40	

Total full-time employees:	2390

Survey Participants:	40
Question Respondents:	40
No Response Count:	0
Response Rate:	100%

Figure 17c: Total number of employees at this facility*: Part-time employees	Count	Percent of Question Respondents
Less than 5	34	85.00%
5-9	2	5.00%
10-19	3	7.50%
50-99	1	2.50%
Total	40	

Total part-time employees:	127

Survey Participants:	40
Question Respondents:	40
No Response Count:	0
Response Rate:	100%

Figure 17d: Total number of employees at this facility*: Temporary employees	Count	Percent of Question Respondents
Less than 5	31	83.78%
5-9	2	5.41%
10-19	1	2.70%
20-49	1	2.70%
Over 100	2	5.41%
Total	37	

Total temporary employees:	404
Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 18: Nature of Employment	Count	Percent of Question Respondents
Full Time	2390	81.82%
Part Time	127	4.35%
Temporary	404	13.83%
Total	2921	

Survey Participants:	40
Question Respondents:	40
Response Rate:	100.00%

Figure 19: Historical employment trend	Count	Percent of Question Respondents
Declining	5	13.16%
Staying the same	13	34.21%
Increasing	20	52.63%
Total	38	

Survey Participants:	40
Question Respondents:	38

No Response Count:	2
Response Rate:	95%

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	57.89%
Stayed the same	13	34.21%
Decreased	3	7.89%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

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	7	23.33%
Stayed the same	20	66.67%
Decreased	3	10.00%
Total	30	

Survey Participants:	40
Question Respondents:	30
No Response Count:	10
Response Rate:	75%

Figure 20c: How did the number of staff change, if at all, in the last 3 years?: Casual	Count	Percent of Question Respondents
Increased	6	22.22%
Stayed the same	19	70.37%
Decreased	2	7.41%
Total	27	

Survey Participants:	40
Question Respondents:	27

No Response Count:	13
Response Rate:	68%

Figure 21: Projected number of employees at this facility in three years	Count	Percent of Question Respondents
Less than 5	6	15.38%
5-9	7	17.95%
10-19	7	17.95%
20-49	11	28.21%
50-99	3	7.69%
Over 100	5	12.82%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 21b: Projected number of employees at this facility in one year*	Count	Percent of Question Respondents
Less than 5	8	20.51%
5-9	7	17.95%
10-19	7	17.95%
20-49	10	25.64%
50-99	1	2.56%
Over 100	6	15.38%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 21c: 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	24	63.16%
Stayed the same	11	28.95%
Decreased	3	7.89%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 21d: 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	6	20.00%
Stayed the same	22	73.33%
Decreased	2	6.67%
Total	30	

Survey Participants:	40
Question Respondents:	30
No Response Count:	10
Response Rate:	75%

Figure 21e: How do you expect the number of staff to change, if at all over the next 3 years?: Casual	Count	Percent of Question Respondents
Increased	7	26.92%
Stayed the same	19	73.08%
Total	26	

Survey Participants:	40
Question Respondents:	26
No Response Count:	14
Response Rate:	65%

Figure 22: Describe the majority of essential personnel at this location	Count	Percent of Question Respondents

26 - 34	6	15.79%
35 - 49	26	68.42%
50 or older	6	15.79%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 23: Describe the wage scale here compared to all other firms locally	Count	Percent of Question Respondents
Lower than	3	8.11%
Same as	18	48.65%
Greater than	16	43.24%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 23b: Average hourly wage: Skilled/Professional	Count	Percent of Question Respondents
$20-$29.99	7	21.21%
$30-49.99	17	51.52%
$50-$99	6	18.18%
$100 or more	3	9.09%
Total	33	

Survey Participants:	40
Question Respondents:	33
No Response Count:	7
Response Rate:	82%

Figure 23c: Average hourly wage: Semi-skilled	Count	Percent of Question Respondents
Under $10	2	8.00%
$15-$19.99	1	4.00%

$20-$29.99	15	60.00%
$30-49.99	6	24.00%
$100 or more	1	4.00%
Total	25	

Survey Participants:	40
Question Respondents:	25
No Response Count:	15
Response Rate:	62%

Figure 23d: Average hourly wage: Entry-level	Count	Percent of Question Respondents
Under $10	4	16.67%
$10-$12.99	1	4.17%
$13-$14.99	1	4.17%
$15-$19.99	7	29.17%
$20-$29.99	7	29.17%
$30-49.99	3	12.50%
$50-$99	1	4.17%
Total	24	

Survey Participants:	40
Question Respondents:	24
No Response Count:	16
Response Rate:	60%

Figure 24: Is the number of unfilled positions	Count	Percent of Question Respondents
Stable	29	76.32%
Increasing	9	23.68%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 25: Where does the company attract the majority of its workers from?	Count	Percent of Question Respondents

Nationally	3	7.89%
Provincially	7	18.42%
Locally	28	73.68%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 26: Recruitment and retention challenges	**Count**	**Percent**
Retention challenges	14	36%
Recruitment challenges	16	43%

Figure 26b: Is employee retention a problem?	**Count**	**Percent of Question Respondents**
Yes	14	35.90%
No	25	64.10%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 26c: Is the company experiencing recruitment problems with any employee positions or skills?	**Count**	**Percent of Question Respondents**
Yes	17	44.74%
No	21	55.26%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 27: If applicable, please describe any challenges and / or efforts	**Count**	**Percent of Question Respondents**

you have undertaken to retain employees.		
Bonuses	1	3.33%
Support personal growth and skill development	1	3.33%
Training	1	3.33%
Benefits	3	10.00%
Support a positive environment	5	16.67%
Avoid layoffs (find extra work)	10	33.33%
Competitive wages	11	36.67%
None	5	16.67%
Total	37	

Survey Participants:	39
Question Respondents:	30
No Response Count:	9
Response Rate:	77%

Figure 28: If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.	Count	Percent of Question Respondents
Canada Job Bank	1	3.12%
Employment agencies	1	3.12%
Internal job postings	1	3.12%
Offer benefits/bonuses	1	3.12%
Recruiting Firms	1	3.12%
Selling on lifestyle	1	3.12%
Social media (Facebook/ LinkedIn)	1	3.12%
Trade Journals	1	3.12%
WorkBC	1	3.12%
College recruitment	2	6.25%
Online job boards	2	6.25%
Networking	3	9.38%
Union hall	3	9.38%
Advertising	5	15.62%
Word of mouth	9	28.12%

None	5	15.62%
Total	38	

Survey Participants:	39
Question Respondents:	32
No Response Count:	7
Response Rate:	82%

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**
Advanced Manufacturing Workers	1	5.88%
Construction/Contractors	1	5.88%
Machinists	1	5.88%
Mechanics	1	5.88%
Administrative/Clerical	2	11.76%
Electrical/Electronics	2	11.76%
General Laborer	2	11.76%
Machine Operators	3	17.65%
Material/Fabricators	3	17.65%
Plant Managers / Operators	3	17.65%
Professional/Other	3	17.65%
Professional/Technical	4	23.53%
None	1	5.88%
Other	12	70.59%
Total	39	

Survey Participants:	40
Question Respondents:	17
No Response Count:	0
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	100%

Figure 29b: Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)	Count	Percent of Question Respondents
Computer technologists	1	5.88%
Computer-aided design (CAD) technologists	1	5.88%
Chemists	2	11.76%
Engineers	3	17.65%
Skilled trades	3	17.65%
Managers	4	23.53%
Total	14	

Survey Participants:	40
Question Respondents:	11
No Response Count:	1
Parent Question 'Other' Respondents:	12
Parent Question Respondents:	17
Response Rate:	92%

Figure 30: Do you anticipate future recruiting difficulties i.e. 3-5 year?	Count	Percent of Question Respondents
Yes	19	50.00%
No	19	50.00%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
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

Administrative/Clerical	1	5.26%
Advanced Manufacturing Workers	1	5.26%
Construction/Contractors	2	10.53%
Machinists	2	10.53%
Professional/Other	2	10.53%
Electrical/Electronics	3	15.79%
General Laborer	3	15.79%
Machine Operators	3	15.79%
Mechanics	3	15.79%
Plant Managers/Operators	3	15.79%
Material/Fabricators	4	21.05%
Professional/Technical	4	21.05%
Other	11	57.89%
Total	42	

Survey Participants:	40
Question Respondents:	19
No Response Count:	0
Parent Question 'Yes' Respondents:	19
Parent Question Respondents:	38
Response Rate:	100%

Figure 30c: Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)	Count	Percent of Question Respondents
Apprentices	1	5.26%
Chemists	1	5.26%
Computer professionals	3	15.79%
Managers	3	15.79%
Skilled trades	3	15.79%
Engineers	4	21.05%
Total	15	

Survey Participants:	40
Question Respondents:	11
No Response Count:	0

Parent Question 'Other' Respondents:	11
Parent Question Respondents:	19
Response Rate:	100%

Figure 31: Is there anything we can do to help overcome issues with employee recruitment?	Count	Percent of Question Respondents
Yes	4	21.05%
No	15	78.95%
Total	19	

Survey Participants:	40
Question Respondents:	19
No Response Count:	21
Response Rate:	48%

Figure 31b: Is there anything we can do to help overcome issues with employee recruitment?: If *Yes*, please explain	Count	Percent of Question Respondents
Provide training and education	1	25.00%
Seminar on how to best post available jobs	1	25.00%
Establish a job bank	2	50.00%
Total	4	

Survey Participants:	40
Question Respondents:	4
No Response Count:	0
Parent Question 'Yes' Respondents:	4
Parent Question Respondents:	19
Response Rate:	100%

Figure 32: Skill Level of Majority of Workforce	Count	Percent of Question Respondents
Skilled/Professional	23	60.53%
Semi-skilled	4	10.53%
Entry-level	1	2.63%
Total	28	

Survey Participants:	40
Question Respondents:	38
Response Rate:	95.00%

Figure 32b: Percent of workforce: Skilled/Professional	Count	Percent of Question Respondents
less than 25%	3	7.89%
25 to 49%	9	23.68%
50 to 74%	8	21.05%
75 to 100%	18	47.37%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 32c: Percent of workforce: Semi-skilled	Count	Percent of Question Respondents
less than 25%	11	34.38%
25 to 49%	15	46.88%
50 to 74%	4	12.50%
75 to 100%	2	6.25%
Total	32	

Survey Participants:	40
Question Respondents:	32
No Response Count:	8
Response Rate:	80%

Figure 32d: Percent of workforce: Entry-level	Count	Percent of Question Respondents

less than 25%	22	78.57%
25 to 49%	4	14.29%
50 to 74%	2	7.14%
Total	28	

Survey Participants:	40
Question Respondents:	28
No Response Count:	12
Response Rate:	70%

Figure 33: Does the company provide a training budget in order to upgrade employee's skills?	**Count**	**Percent of Question Respondents**
Yes	25	67.57%
No	12	32.43%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 33b: Does the company offer in-house training?	**Count**	**Percent of Question Respondents**
Yes	12	60.00%
No	8	40.00%
Total	20	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Figure 33c: Does the company use Contracted Training?	**Count**	**Percent of Question Respondents**
Yes	2	10.00%
No	18	90.00%

Total	20	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

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	17	43.59%
No	22	56.41%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

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	24	63.16%
No	14	36.84%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 35b: Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what	**Count**	**Percent of Question Respondents**

are they?		
Accounting/Bookkeeping	1	4.17%
Build capacity with government	1	4.17%
Propane certification	1	4.17%
Social media	1	4.17%
Time management	1	4.17%
Training to get the job done	1	4.17%
Emerging industry practices	2	8.33%
Emerging technologies	2	8.33%
Safety/First Aid/Food Safe	2	8.33%
Technical training	2	8.33%
Customer service	3	12.50%
Managerial training	3	12.50%
Sales/Marketing	3	12.50%
Business management	4	16.67%
Total	27	

Survey Participants:	40
Question Respondents:	24
No Response Count:	0
Parent Question 'Yes' Respondents:	24
Parent Question Respondents:	38
Response Rate:	100%

Figure 36: What new training might you need to consider in the next five years?	Count	Percent of Question Respondents
Computer and technology training	2	10.53%
Emerging industry practices	3	15.79%
Product training	3	15.79%
Emerging technologies	5	26.32%

None	8	42.11%
Total	21	

Survey Participants:	40
Question Respondents:	19
No Response Count:	21
Response Rate:	48%

Figure 37: What modes of education/training work best for you?	Count	Percent of Question Respondents
Individual coaching	12	30.77%
Online/ Webinar training	25	64.10%
Classroom	33	84.62%
Other	4	10.26%
Total	74	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 37b: What modes of education/training work best for you?: Other Name	Count	Percent of Question Respondents
Mentor	1	2.56%
In-house / Hands on / Workshop	3	7.69%
Total	4	

Survey Participants:	40
Question Respondents:	4
No Response Count:	0
Parent Question 'Other' Respondents:	4
Parent Question Respondents:	39
Response Rate:	100%

Figure 38: When your staff attends training/certification,	Count	Percent of Question Respondents

where do they usually access the training?		
United States	5	12.82%
Regional	9	23.08%
Rest of Canada	10	25.64%
Local	19	48.72%
British Columbia	21	53.85%
Total	64	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Union status	Count	Percent of Question Respondents
Yes	9	23.08%
No	30	76.92%
Total	39	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 39: Please indicate which issues you believe are critical to your employees?	Count	Percent of Question Respondents
Housing	9	25.00%
Transportation	11	30.56%
Child care	12	33.33%
Cost of living	12	33.33%
Other	11	30.56%
Total	55	

Survey Participants:	39
Question Respondents:	36
No Response Count:	3
Response Rate:	92%

Figure 39b: Please indicate which issues you believe are critical to your employees?: If *Other*, please list any other issues	Count	Percent of Question Respondents
Affordable housing	1	2.78%
Benefits	1	2.78%
Getting enough work hours	1	2.78%
Job security	1	2.78%
Public transit	1	2.78%
Recreation amenities	1	2.78%
Wages	1	2.78%
Work environment	1	2.78%
Lifestyle	4	11.11%
Total	12	

Survey Participants:	39
Question Respondents:	11
No Response Count:	0
Parent Question 'Other' Respondents:	11
Parent Question Respondents:	36
Response Rate:	100%

In general terms, what percent of your workforce lives in the: Community (%)	Count	Percent of Question Respondents
0-24%	2	5.41%
50-74%	4	10.81%
75-100%	31	83.78%
Total	37	

Survey Participants:	39
Question Respondents:	37
No Response Count:	2
Response Rate:	95%

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%	19	82.61%
25-49%	3	13.04%
75-100%	1	4.35%
Total	23	

Survey Participants:	39
Question Respondents:	23
No Response Count:	16
Response Rate:	59%

In general terms, what percent of your workforce lives in the: Outside of region (%)	Count	Percent of Question Respondents
0-24%	16	76.19%
25-49%	3	14.29%
75-100%	2	9.52%
Total	21	

Survey Participants:	39
Question Respondents:	21
No Response Count:	18
Response Rate:	54%

SALES

Figure 40: Annual sales at this facility (optional)	Count	Percent of Question Respondent s
Under $25,000	1	4.76%
$99,999 to $50,000	1	4.76%
499,999 to $100,000	2	9.52%
$999,999 to $500,000	3	14.29%
$4.9 million to 1 million	6	28.57%
$9.9 million to 5 million	3	14.29%
$50 million to 20 million	3	14.29%

over $50 million	2	9.52%
Total	21	

Survey Participants:	40
Question Respondents:	21
No Response Count:	19
Response Rate:	52%

Figure 41: Is the market for your product/service	Count	Percent of Question Respondents
Stable	20	52.63%
Decreasing	1	2.63%
Increasing	17	44.74%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 42: Is the market share (compared to your competitors) of your company's products	Count	Percent of Question Respondents
Stable	19	50.00%
Decreasing	2	5.26%
Increasing	17	44.74%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 43: What is the projected sales growth in the next year at this business?	Count	Percent of Question Respondents
Declining	1	2.94%
0%	6	17.65%
1 - 9%	15	44.12%
10 - 24%	4	11.76%
25 - 49%	6	17.65%
50 - 99%	2	5.88%
Total	34	

Survey Participants:	40
Question Respondents:	34
No Response Count:	6
Response Rate:	85%

Figure 44: Historical sales trend: At this business (past five years)	Count	Percent of Question Respondents
Declining	3	7.89%
Staying the same	11	28.95%
Increasing	22	57.89%
Not applicable	2	5.26%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 45: Historical sales trend: At the parent company	Count	Percent of Question Respondents
Staying the same	5	16.67%
Increasing	9	30.00%

Not applicable	16	53.33%
Total	30	

Survey Participants:	40
Question Respondents:	30
No Response Count:	10
Response Rate:	75%

Figure 46: Historical sales trend: Within the industry	**Count**	**Percent of Question Respondents**
Declining	1	2.70%
Staying the same	14	37.84%
Increasing	19	51.35%
Not applicable	3	8.11%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 47: Historical export sales trend	**Count**	**Percent of Question Respondents**
Declining	2	5.26%
Staying the same	6	15.79%
Increasing	9	23.68%
Not applicable	21	55.26%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 48: Percent of total sales generated by top 3 customers	Count	Percent of Question Respondents
26 - 50%	3	15.00%
51 - 75%	4	20.00%
76 - 100%	13	65.00%
Total	20	

Survey Participants:	39
Question Respondents:	20
No Response Count:	19
Response Rate:	51%

Figure 49: Source of Majority of Sales	Count	Percent of Question Respondents
Local	27	79.41%
Provincial	2	5.88%
National	1	2.94%
United States	3	8.82%
International	1	2.94%
Total	34	

Figure 49b: Please identify the source of your sales by percentage: International	Count	Percent of Question Respondents
0%	13	68.42%
1-9%	2	10.53%
10-19%	1	5.26%
20-29%	1	5.26%
50-59%	1	5.26%
70-79%	1	5.26%
Total	19	

Survey Participants: 40

Question Respondents:	19
No Response Count:	21
Response Rate:	48%

Figure 49c: Please identify the source of your sales by percentage: United States	Count	Percent of Question Respondents
0%	14	63.64%
10-19%	2	9.09%
20-29%	1	4.55%
40-49%	1	4.55%
50-59%	1	4.55%
70-79%	1	4.55%
80-89%	1	4.55%
90-99%	1	4.55%
Total	22	

Survey Participants:	40
Question Respondents:	22
No Response Count:	18
Response Rate:	55%

Figure 49d: Please identify the source of your sales by percentage: National	Count	Percent of Question Respondents
0%	13	54.17%
1-9%	1	4.17%
10-19%	5	20.83%
30-39%	2	8.33%
50-59%	2	8.33%
80-89%	1	4.17%
Total	24	

Survey Participants:	40
Question Respondents:	24
No Response Count:	16
Response Rate:	60%

Figure 49e: Please identify the source of your sales by percentage: Provincial	Count	Percent of Question Respondents
0%	9	39.13%
1-9%	2	8.70%
10-19%	1	4.35%
20-29%	6	26.09%
50-59%	3	13.04%
60-69%	1	4.35%
90-99%	1	4.35%
Total	23	

Survey Participants:	40
Question Respondents:	23
No Response Count:	17
Response Rate:	57%

Figure 49f: Please identify the source of your sales by percentage: Local / Regional	Count	Percent of Question Respondents
0%	3	8.82%
10-19%	2	5.88%
30-39%	2	5.88%
70-79%	1	2.94%
80-89%	7	20.59%
90-99%	3	8.82%
100%	16	47.06%
Total	34	

Survey Participants:	40
Question Respondents:	34
No Response Count:	6
Response Rate:	85%

Figure 50: International trade status	Count	Percent of Question Respondents

Export	10	25.64%
Import	13	33.33%
None	2	5.13%
Not applicable	22	56.41%
Total	47	

Survey Participants:	40
Question Respondents:	39
No Response Count:	1
Response Rate:	98%

Figure 51: Do you engage in government procurement?	**Count**	**Percent of Question Respondents**
Yes	9	36.00%
No	16	64.00%
Total	25	

Survey Participants:	39
Question Respondents:	25
No Response Count:	14
Response Rate:	64%

Figure 52: Source of Majority of Supplies	**Count**	**Percent of Question Respondents**
Local	15	45.45%
Provincial	10	30.30%
National	2	6.06%
United States	0	0.00%
International	2	6.06%
Total	29	

Figure 52b: Please identify the source of your supplies by percentage: Local / Regional	Count	Percent of Question Respondents
0%	4	12.12%
1-9%	4	12.12%
10-19%	4	12.12%
20-29%	1	3.03%
30-39%	1	3.03%
40-49%	1	3.03%
50-59%	3	9.09%
60-69%	1	3.03%
80-89%	2	6.06%
90-99%	1	3.03%
100%	11	33.33%
Total	33	

Survey Participants:	40
Question Respondents:	33
No Response Count:	7
Response Rate:	82%

Figure 52c: Please identify the source of your supplies by percentage: Provincial	Count	Percent of Question Respondents
0%	9	34.62%
20-29%	4	15.38%
30-39%	1	3.85%
50-59%	2	7.69%
60-69%	1	3.85%
70-79%	2	7.69%
80-89%	2	7.69%
90-99%	4	15.38%
100%	1	3.85%
Total	26	

Survey Participants:	40
Question Respondents:	26

No Response Count:	14
Response Rate:	65%

Figure 52d: Please identify the source of your supplies by percentage: National	Count	Percent of Question Respondents
0%	9	40.91%
1-9%	1	4.55%
10-19%	2	9.09%
20-29%	5	22.73%
30-39%	1	4.55%
50-59%	2	9.09%
60-69%	1	4.55%
100%	1	4.55%
Total	22	

Survey Participants:	40
Question Respondents:	22
No Response Count:	18
Response Rate:	55%

Figure 52e: Please identify the source of your supplies by percentage: United States	Count	Percent of Question Respondents
0%	8	32.00%
1-9%	3	12.00%
10-19%	2	8.00%
20-29%	7	28.00%
30-39%	1	4.00%
50-59%	4	16.00%
Total	25	

Survey Participants:	40
Question Respondents:	25
No Response Count:	15
Response Rate:	62%

Figure 52f: Please identify the source of your supplies by percentage: International	Count	Percent of Question Respondents
0%	13	76.47%
1-9%	1	5.88%
50-59%	2	11.76%
70-79%	1	5.88%
Total	17	

Survey Participants:	40
Question Respondents:	17
No Response Count:	23
Response Rate:	42%

Figure 53: 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
All of our products and services	1	5.26%
Graphite	1	5.26%
Heavy equipment/parts	1	5.26%
Lab services	1	5.26%
Metal working services	1	5.26%
Office supplies	1	5.26%
Quartz	1	5.26%
Robots (Drones)	1	5.26%
Safety equipment	1	5.26%
Computers / Software	2	10.53%
Powder Coating	2	10.53%
Steel	3	15.79%
None	1	5.26%
Total	17	

Survey Participants:	39
Question Respondents:	19
No Response Count:	20

Response Rate: 49%
Response Rate: 50%

Figure 53b: 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
Loyalty to current supplier	1	4%
Unaware of local venders	1	4%
Higher costs locally	4	17%
Product not available here	21	88%
Total	27	

Survey Participants: 38
Question Respondents: 24
No Response Count: 14
Response Rate: 63%

Figure 54: Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	17	85.00%
No	3	15.00%
Total	20	

Survey Participants: 40
Question Respondents: 20
No Response Count: 20
Response Rate: 50%

Facilities and Equipment

Figure 55: What is the square footage of your current facility?: Square feet	Count	Percent of Question Respondents

less than 1,000 sq. ft.	7	19.44%
1,000-4,999 sq. ft.	12	33.33%
5,000-9,999 sq. ft.	6	16.67%
10,000-19,999 sq. ft.	4	11.11%
20,000 sq. ft. or more	7	19.44%
Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Figure 56: Condition of facility	Count	Percent of Question Respondents
Excellent	8	21.62%
Good	23	62.16%
Fair	3	8.11%
Poor	3	8.11%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 57: Condition of equipment	Count	Percent of Question Respondents
Excellent	11	29.73%
Good	25	67.57%
Fair	1	2.70%
Total	37	

Survey Participants:	40

Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 58: Status of facility	Count s	Percent of Question Respondent
Leased	16	44.44%
Owned	20	55.56%
Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Figure 59: Status of facility: If *Leased*, what is the length of term remaining	Count	Percent of Question Respondents
<1 Year	9	60.00%
1-2 Years	3	20.00%
3-5 Years	2	13.33%
>5 Years	1	6.67%
Total	15	

Survey Participants:	40
Question Respondents:	15
No Response Count:	1
Parent Question 'Leased' Respondents:	16
Parent Question Respondents:	36
Response Rate:	94%

Figure 59b: Are you planning on renewing current lease?	Count	Percent of Question Respondents
Yes	15	78.95%
No	1	5.26%
Total	16	

Survey Participants:	40
Question Respondents:	19
No Response Count:	0
Parent Question 'Leased' Respondents:	16
Parent Question Respondents:	36
Response Rate:	100%

Figure 59c: Are you planning on renewing current lease?: If *No*, why not	Count	Percent of Question Respondents
Seeking larger building	1	100.00%
Total	1	

Survey Participants:	40
Question Respondents:	1
No Response Count:	0
Parent Question 'No' Respondents:	1
Parent Question Respondents:	19
Response Rate:	100%

Figure 59d: Do you have a preference of lease vs own?	Count	Percent of Question Respondents
Lease	9	45.00%
Own	11	55.00%
Total	20	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Figure 60: Historical investment trends: Over past 18 months in the ***facility***	Count	Percent of Question Respondents
Declining	1	2.78%
Staying the same	20	55.56%
Increasing	15	41.67%
Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Figure 61: Does the company plan to expand in the next three years?	Count	Percent of Question Respondents
Yes	17	44.74%
No	21	55.26%
Total	38	

Survey Participants:	40

Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 61b: Are there any local expansion plans in the next 12 - 18 months?	Count	Percent of Question Respondents
Yes	17	45.95%
No	20	54.05%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 61c: Does the company plan to expand in the next three years?: Estimated timeframe for expansion	Count	Percent of Question Respondents
<1 Year	3	18.75%
1-3 Years	12	75.00%
>3 Years	1	6.25%
Total	16	

Survey Participants:	40
Question Respondents:	16
No Response Count:	1
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	94%

Figure 62: Is there room for expansion at this site?	Count	Percent of Question Respondents
Yes	25	65.79%
No	8	21.05%
Maybe	5	13.16%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 63: 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	14	82.35%
No	3	17.65%
Total	17	

Survey Participants:	40
Question Respondents:	17
No Response Count:	0
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	100%

Figure 64: Does the company plan to expand in the next three years? Will it be in this community?	Count	Percent of Question Respondents

Yes	16	94.12%
No	1	5.88%
Total	17	

Survey Participants:	40
Question Respondents:	17
No Response Count:	0
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	100%

Figure 65: Does the company plan to expand in the next three years?: Estimated total investment	**Count**	**Percent of Question Respondents**
Less than $25,000	2	18.18%
$25,000-$99,999	1	9.09%
$100,000-$499,999	2	18.18%
$500,000-$999,999	3	27.27%
$1-$4.9 million	2	18.18%
$20 million and over	1	9.09%
Total	11	

Survey Participants:	40
Question Respondents:	11
No Response Count:	6
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	65%

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

equipment/technology		
0%	1	11.11%
Under 50%	2	22.22%
50 to 99%	2	22.22%
100%	4	44.44%
Total	9	

Survey Participants:	40
Question Respondents:	9
No Response Count:	8
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	53%

Figure 67: Does the company plan to expand in the next three years?: Approximate percentage real estate	**Count**	**Percent of Question Respondents**
0%	2	20.00%
Under 50%	2	20.00%
50 to 99%	1	10.00%
100%	5	50.00%
Total	10	

Survey Participants:	40
Question Respondents:	10
No Response Count:	7
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	59%

Figure 68: 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.	3	30.00%
1,000 to 4,999 sq. ft.	3	30.00%
5,000-9,999 sq. ft.	2	20.00%
10,000-19,999 sq. ft.	2	20.00%
Total	10	

Survey Participants:	40
Question Respondents:	10
No Response Count:	7
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38
Response Rate:	59%

Figure 69: Have there been any recent facility upgrades?	Count	Percent of Question Respondents
Yes	8	40.00%
No	12	60.00%
Total	20	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Figure 69b: Have there been any recent facility upgrades? If *Yes*, when?: Month scale	Count	Percent of Question Respondents

6	2	28.57%
12	3	42.86%
18	1	14.29%
36	1	14.29%
Total	7	

Survey Participants:	40
Question Respondents:	7
No Response Count:	1
Parent Question 'Yes' Respondents:	8
Parent Question Respondents:	20
Response Rate:	88%

Figure 70: Planning any upgrades to the facility?	Count	Percent of Question Respondents
Yes	8	42.11%
No	11	57.89%
Total	19	

Survey Participants:	40
Question Respondents:	19
No Response Count:	21
Response Rate:	48%

Figure 70b: Planning any upgrades to the facility? If *Yes*, when?: Month scale	Count	Percent of Question Respondents
6	1	12.50%
12	4	50.00%
18	1	12.50%
24	2	25.00%
Total	8	

Survey Participants: 40

Question Respondents:	8
No Response Count:	0
Parent Question 'Yes' Respondents:	8
Parent Question Respondents:	19
Response Rate:	100%

Figure 71: If *No*, are there any barriers to upgrading you wish to identify?	Count	Percent of Question Respondents
None	3	100%
Total	3	

Survey Participants:	40
Question Respondents:	3
No Response Count:	8
Parent Question 'No' Respondents:	11
Parent Question Respondents:	19
Response Rate:	27%

Figure 71b: What, if any, are the major constraints on your expansion? (Please check all that are applicable)	Count	Percent of Question Respondents
Broadband access	1	3.85%
Lack of skilled staff	1	3.85%
Lack of suitable premises	1	3.85%
Transport/freight	1	3.85%
Finance	3	11.54%
Identifying and accessing new markets	3	11.54%

Other (please specify):	5	19.23%
Total	15	

Survey Participants:	40
Question Respondents:	26
No Response Count:	0
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	38

Figure 71c: What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)	Count	Percent of Question Respondents
Financing	1	9%
Finding more projects	1	9%
Lack of Suitable Premises	1	9%
Skilled labour supply	1	9%
Time	1	9%
Demand for service / product	2	18%
Economic uncertainty	2	18%
Total	9	

Survey Participants:	40
Question Respondents:	11
No Response Count:	0
Parent Question 'Other (please specify):' Respondents:	11
Parent Question Respondents:	26
Response Rate:	100%

Figure 72: Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?	Count	Percent of Question Respondents
Yes	3	9.09%
No	30	90.91%
Total	33	

Survey Participants:	40
Question Respondents:	33
No Response Count:	7
Response Rate:	82%

Figure 72b: If *Yes*, which have you approached?	Count	Percent of Question Respondents
BC Hydro	1	33%
BC Ministry responsible for Economic Development	1	33%
Other (please specify):	1	33%
Local Council	2	67%
Local Economic Development Office	3	100%
Total	8	

Survey Participants:	40
Question Respondents:	3
No Response Count:	0
Parent Question 'Yes' Respondents:	3
Parent Question	33

Respondents:	
Response Rate:	100%

Figure 72c: If *Yes*, which have you approached?: Other (please specify)	Count	Percent of Question Respondents
Banks / Credit unions	1	33.33%
CBT (Columbia Basin Trust)	1	33.33%
Total	2	

Survey Participants:	40
Question Respondents:	1
No Response Count:	0
Parent Question 'Other' Respondents:	1
Parent Question Respondents:	3
Response Rate:	100%

Figure 73: Have you factored improvements in energy efficiency in your expansion plans?	Count	Percent of Question Respondents
Yes	5	20.83%
No	19	79.17%
Total	24	

Survey Participants:	39
Question Respondents:	24
No Response Count:	15
Response Rate:	62%

Figure 74: Are you aware of BC Hydro Power Smart resources that are available to you?	Count	Percent of Question Respondents
Yes	21	55.26%
No	17	44.74%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Government Services

Figure 75: Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	16	84.21%	0	0.00%	0	0.00%	3	15.79%	0	0.00%	19
Access to US Border	5	25.00%	0	0.00%	0	0.00%	9	45.00%	6	30.00%	20
Access to airport facilities	0	0.00%	2	6.25%	4	12.50%	19	59.38%	7	21.88%	32
Access to highway/ roads	0	0.00%	0	0.00%	2	6.25%	22	68.75%	8	25.00%	32
Access to markets	0	0.00%	0	0.00%	5	15.62%	18	56.25%	9	28.12%	32
Access to suppliers	0	0.00%	1	3.23%	6	19.35%	19	61.29%	5	16.13%	31
Availability of appropriately zoned land	1	3.85%	3	11.54%	2	7.69%	19	73.08%	1	3.85%	26
Availability of buildings for lease or purchase	1	3.85%	4	15.38%	1	3.85%	19	73.08%	1	3.85%	26
Availability of rail transport	18	75.00%	0	0.00%	2	8.33%	1	4.17%	3	12.50%	24
Availability of road transport services	1	3.12%	0	0.00%	7	21.88%	17	53.12%	7	21.88%	32
Availability of warehousing	10	40.00%	0	0.00%	0	0.00%	12	48.00%	3	12.00%	25
Development approval process	2	7.69%	1	3.85%	1	3.85%	21	80.77%	1	3.85%	26
Disposal of waste material	6	22.22%	2	7.41%	1	3.70%	17	62.96%	1	3.70%	27

Inspections /licensing	4	14.29%	1	3.57 %	1	3.57 %	20	71.43 %	2	7.14%	28
Recycling	5	16.67%	0	0.00 %	0	0.00 %	22	73.33 %	3	10.00%	30
Telecommunications (internet, cell)	0	0.00%	3	10.00 %	8	26.6 7%	17	56.67 %	2	6.67%	30
Water and sewerage supply	5	18.52%	1	3.70 %	1	3.70 %	18	66.67 %	2	7.41%	27

Survey Participants: 40

Figure 76: Do you have any suggestions on how to improve any of the services and infrastructure listed above?	**Count**	**Percent of Question Respondents**
Yes	17	47.22%
No	19	52.78%
Total	36	

Survey Participants:	40
Question Respondents:	36
No Response Count:	4
Response Rate:	90%

Figure 76b: Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If *Yes*, how?	**Count**	**Percent of Question Respondents**
Downtown revitalization	1	5.88%
Improve highway and road quality and service	1	5.88%
Improve recycling and waste management	1	5.88%
Increase attention to community and business needs	1	5.88%
Increase operational hours of border services	1	5.88%
Streamline development approval processes	1	5.88%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	6	35.29%
Improve Airport service	6	35.29%
Total	18	

Survey Participants:	40
Question Respondents:	17
No Response Count:	0
Parent Question 'Yes' Respondents:	17
Parent Question Respondents:	36

Figure 77: Which airport services do you use?	Count	Percent of Question Respondents
Trail	1	5.26%
Castlegar	3	15.79%
Total	4	

Survey Participants:	40
Question Respondents:	19
No Response Count:	21
Response Rate:	48%

Figure 78: Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)	Count	Percent of Question Respondents
Commuter flights	1	5.00%
Improve airport scanning services	1	5.00%
Passenger service	1	5.00%
Food service	2	10.00%
Better flight reliability	6	30.00%
Total	11	

Survey Participants:	40
Question Respondents:	20
No Response Count:	20
Response Rate:	50%

Business Climate

Figure 79: Please rate the local business climate	Count	Percent of Question Respondents
Excellent	5	14%
Good	24	65%
Fair	7	19%
Poor	1	3%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 80: Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Chamber of Commerce	3	15.00%	4	20.00%	7	35.00%	6	30.00%	0	0.00%	20
Colleges/Universities	6	15.79%	4	10.53%	2	5.26%	25	65.79%	1	2.63%	38
Community Futures	15	75.00%	0	0.00%	0	0.00%	5	25.00%	0	0.00%	20
Cultural/Recreational Amenities	3	7.89%	1	2.63%	3	7.89%	13	34.21%	18	47.37%	38
Economic Development	4	10.53%	3	7.89%	11	28.95%	20	52.63%	0	0.00%	38
Housing	3	7.89%	3	7.89%	6	15.79%	23	60.53%	3	7.89%	38
K-12 education	7	18.42%	1	2.63%	6	15.79%	23	60.53%	1	2.63%	38
Local Government	3	7.89%	5	13.16%	10	26.32%	18	47.37%	2	5.26%	38
Local Tax Structure	6	15.79%	7	18.42%	11	28.95%	13	34.21%	1	2.63%	38
Technical Training	3	8.11%	22	59.46%	7	18.92%	5	13.51%	0	0.00%	37
Tourism services	3	15.00%	0	0.00%	0	0.00%	17	85.00%	0	0.00%	20
Workforce Availability	3	7.89%	6	15.79%	12	31.58%	8	21.05%	9	23.68%	38
Workforce Quality	2	5.26%	4	10.53%	6	15.79%	13	34.21%	13	34.21%	38

Workforce Stability	**4**	**10.53%**	**3**	**7.89%**	**9**	**23.68%**	**13**	**34.21%**	**9**	**23.68%**	**38**
Survey Participants:	**40**										

Figure 81: Please compare the local business climate today versus 5 years ago	Count	Percent of Question Respondents
Better today	22	59.46%
No change	7	18.92%
Worse today	5	13.51%
No opinion	3	8.11%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 81b: Please compare the local business climate today versus 5 years ago: If *worse today*, why?	Count	Percent of Question Respondents
Declining economy	1	20.00%
More competition	1	20.00%
Businesses closing	2	40.00%
Total	4	

Survey Participants:	40
Question Respondents:	5
No Response Count:	0
Parent Question 'Worse today' Respondents:	5
Parent Question Respondents:	37
Response Rate:	100%

Figure 82: Do you have any forecast for the condition of the local business climate 5 years from today?	Count	Percent of Question Respondents
Will be better	19	50.00%
No change	15	39.47%
Will be worse	3	7.89%

No opinion	1	2.63%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 83: What are the community's strengths as a place to do business?	Count	Percent of Question Respondents
Affordable	1	2.63%
Central location for region	1	2.63%
Environment	1	2.63%
Friendliness	1	2.63%
Great place to live	1	2.63%
Growth potential	1	2.63%
Low crime rate	1	2.63%
Natural beauty	1	2.63%
Word of mouth	1	2.63%
Recreational opportunities	2	5.26%
Location	3	7.89%
Skilled workforce	3	7.89%
Great community	4	10.53%
Stable economy	5	13.16%
Large industrial base	6	15.79%
Lifestyle	10	26.32%
Total	42	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 84: What are the community's weaknesses as a place to do business?	Count	Percent of Question Respondents
Competition	1	2.70%

Lack of skilled workforce	1	2.70%
Risk aversion	1	2.70%
Suitable staff	1	2.70%
Tax structure	1	2.70%
Cyclical nature of markets	2	5.41%
Dependent on one major industry	2	5.41%
Limited market	2	5.41%
Location	2	5.41%
Development Constraints (Zoning/Bureaucracy/Permits)	3	8.11%
Population (size/growth/aging)	4	10.81%
Shipping and Receiving costs	4	10.81%
Geographic isolation	6	16.22%
Total	30	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Figure 85: Are there any barriers to growth in this community?	Count	Percent of Question Respondents
Yes	29	76.32%
No	9	23.68%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 85b: Are there any barriers to growth in this community? : If *Yes*, what are they?	Count	Percent of Question Respondents

Access to capital	1	3.45%
Cost of doing business	1	3.45%
Environmentalists	1	3.45%
Fear of major employer closing	1	3.45%
Internet access	1	3.45%
Zoning	1	3.45%
Negative attitude	2	6.90%
Population (size / growth / age)	2	6.90%
Resistance to change	2	6.90%
Skilled labour	2	6.90%
Shipping costs	3	10.34%
Developmental approval process	4	13.79%
Low economic diversification	4	13.79%
Isolated location	5	17.24%
Total	30	

Survey Participants:	40
Question Respondents:	29
No Response Count:	0
Parent Question 'Yes' Respondents:	29
Parent Question Respondents:	38
Response Rate:	100%

Figure 86: Level of service from business support providers	Not Applicable	% Not Applicable	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Basin Business Advisors	16	80.00%	0	0.00%	0	0.00%	0	0.00%	4	20.00%	0	0.00%	20
Chamber of Commerce	6	30.00%	0	0.00%	8	40.00%	1	5.00%	5	25.00%	0	0.00%	20
College Industry Liaison Officer	15	75.00%	0	0.00%	0	0.00%	0	0.00%	5	25.00%	0	0.00%	20
Community Futures	15	78.95%	0	0.00%	0	0.00%	0	0.00%	4	21.05%	0	0.00%	19
Continuing Education and Workforce Training	14	70.00%	0	0.00%	0	0.00%	0	0.00%	6	30.00%	0	0.00%	20
Economic Development Organization / Commission	6	30.00%	1	5.00%	0	0.00%	1	5.00%	11	55.00%	1	5.00%	20
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	4	20.00%	0	0.00%	0	0.00%	2	10.00%	10	50.00%	4	20.00%	20
Invest Kootenay	15	75.00%	0	0.00%	0	0.00%	0	0.00%	5	25.00%	0	0.00%	20
National Research Council Industrial Research Assistance	10	50.00%	0	0.00%	0	0.00%	0	0.00%	9	45.00%	1	5.00%	20
Scientific Research and Experimental Development Tax Incentive Program	9	47.37%	0	0.00%	0	0.00%	0	0.00%	9	47.37%	1	5.26%	19
Survey Participants:	39												

Figure 87: Are there suppliers you think could locate in this region?	Count	Percent of Question Respondents
Yes	6	15.79%
No	32	84.21%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 87b: Are there suppliers you think could locate in this region?: If *Yes*, please list	Count	Percent of Question Respondents
Building supplies	1	20.00%
Lab services	1	20.00%
Software developers	1	20.00%
Retail stores	2	40.00%
Total	5	

Survey Participants:	40
Question Respondents:	5
No Response Count:	1
Parent Question 'Yes' Respondents:	6
Parent Question Respondents:	38
Response Rate:	83%

Figure 88: Do you supply your products or services to any company in the community or region?	Count	Percent of Question Respondents
Yes	17	89%
No	2	11%
Total	19	

Survey Participants:	39
Question Respondents:	19
No Response Count:	20
Response Rate:	49%

Figure 89: Tell us which business, sector, or industry to attract that would strategically benefit you or your industry	Count	Percent of Question Respondents
Analytical lab services	1	4.00%
Information Technology	1	4.00%
Mining and exploration	1	4.00%
Restaurants	1	4.00%
Technology businesses	1	4.00%
Tourism	1	4.00%
Recreational services	2	8.00%
Construction	5	20.00%
Manufacturing	11	44.00%
Total	24	

Survey Participants:	40
Question Respondents:	25
No Response Count:	15
Response Rate:	62%

Figure 90: 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	7	18.42%	20	52.63%	11	28.95%	38
Accessing capital	2	5.26%	19	50.00%	17	44.74%	38
Add or change in business, products or services	2	5.26%	9	23.68%	27	71.05%	38
Affordable shipping/freight	3	7.89%	11	28.95%	24	63.16%	38

Availability of telecommunications infrastructure and services	**1**	**2.63%**	**5**	**13.16%**	**32**	**84.21%**	**38**
Energy costs	**4**	**10.81%**	**21**	**56.76%**	**12**	**32.43%**	**37**
Exchange rate for Canadian dollar	**3**	**7.89%**	**17**	**44.74%**	**18**	**47.37%**	**38**
Expansion of workforce employees	**0**	**0.00%**	**14**	**37.84%**	**23**	**62.16%**	**37**
Improvement business management	**1**	**2.78%**	**3**	**8.33%**	**32**	**88.89%**	**36**

Improvement of customer services	**1**	**2.63%**	**5**	**13.16%**	**32**	**84.21%**	**38**
Improving worker productivity	**0**	**0.00%**	**5**	**13.51%**	**32**	**86.49%**	**37**
New market development locally	**4**	**10.53%**	**5**	**13.16%**	**29**	**76.32%**	**38**
New market development outside of region	**1**	**2.63%**	**6**	**15.79%**	**31**	**81.58%**	**38**
New product research and development	**1**	**2.70%**	**13**	**35.14%**	**23**	**62.16%**	**37**

Reliable air transportation	**2**	**5.26%**	**18**	**47.37%**	**18**	**47.37%**	**38**
Strategic alliances (joining with other businesses to provide products/services)	**2**	**5.41%**	**2**	**5.41%**	**33**	**89.19%**	**37**
Water/sewer availability	**10**	**26.32%**	**23**	**60.53%**	**5**	**13.16%**	**38**
Water/sewer costs	**9**	**23.68%**	**22**	**57.89%**	**7**	**18.42%**	**38**
Workforce skill development	**0**	**0.00%**	**3**	**8.11%**	**34**	**91.89%**	**37**

Workplace health and safety	**0**	**0.00%**	**5**	**13.16%**	**33**	**86.84%**	**38**
Survey Participants:	**39**						

Figure 91: Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	1	3.03%	0	0.00%	2	6.06%	23	69.70%	7	21.21%	33
Investing in people and skills	1	3.23%	0	0.00%	3	9.68%	19	61.29%	8	25.81%	31
Leadership and management capacity	0	0.00%	0	0.00%	2	6.06%	22	66.67%	9	27.27%	33
Measuring impact of productivity efforts/ investments	3	9.09%	1	3.03%	3	9.09%	18	54.55%	8	24.24%	33
Networking and collaboration with other businesses	2	6.25%	1	3.12%	0	0.00%	19	59.38%	10	31.25%	32
Organizing work (structures & processes)	2	6.06%	0	0.00%	2	6.06%	20	60.61%	9	27.27%	33
Productive workplace culture	0	0.00%	0	0.00%	1	3.03%	25	75.76%	7	21.21%	33

Survey Participants: 39

Figure 92: 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
Education	1	3.45%
Health & wellness	3	10.34%
Other niche service businesses (e.g. services to seniors)	4	13.79%
Construction	5	17.24%
Forestry	5	17.24%
Arts	6	20.69%
Relocation of people from urban centres	6	20.69%
culture and creative businesses	6	20.69%
Green or environmental businesses	11	37.93%
Manufacturing	11	37.93%
Technology-based businesses	14	48.28%
Tourism	15	51.72%
Other	9	31.03%
Total	96	

Survey Participants:		39
Question Respondents:		29
No Response Count:		10
Response Rate:	74%	

Figure 92b: 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 *Other* please specify	Count	Percent of Question Respondents
Hydroelectricity	1	3.45%
Pulp	1	3.45%
Recycling	1	3.45%
Renewable Energy	1	3.45%

Mining	3	10.34%
Total	7	

Survey Participants:	39
Question Respondents:	5
No Response Count:	4
Parent Question 'Other' Respondents:	9
Parent Question Respondents:	29
Response Rate:	56%

Is your business impacted by its proximity to the Alberta border?	Count	Percent of Question Respondents
No	20	100.00%
Total	20	

Survey Participants:	39
Question Respondents:	20
No Response Count:	19
Response Rate:	51%

Is your business impacted by its proximity to the Alberta border?: If *Yes*, please explain	Count	Percent of Question Respondents
Total	0	

Survey Participants:	39
Question Respondents:	0
No Response Count:	0
Parent Question 'Yes' Respondents:	0
Parent Question Respondents:	20
Response Rate:	0%

Assessment and Plans

Figure 93: Rate the following: Facility's overall health	Count	Percent of Question Respondents
Excellent	12	31.58%
Good	23	60.53%
Fair	3	7.89%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 94: Rate the following: Overall health of the parent company	Count	Percent of Question Respondents
Excellent	6	15.79%
Good	7	18.42%
Fair	1	2.63%
Not applicable	24	63.16%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 95: Rate the following: Local management's attitude toward the community	Count	Percent of Question Respondents
Excellent	13	34.21%
Good	20	52.63%

Fair	2	5.26%
Poor	1	2.63%
Not applicable	2	5.26%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Figure 96: Rate the following: Parent company's attitude towards the community	Count	Percent of Question Respondents
Excellent	3	8.11%
Good	8	21.62%
Poor	3	8.11%
Not applicable	23	62.16%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%

Rate the risk: Facility closing in the next 1 - 3 years	Count	Percent of Question Respondents
Low	38	100.00%
Total	38	

Survey Participants:	40
Question Respondents:	38
No Response Count:	2
Response Rate:	95%

Rate the risk: Facility downsizing in the next 1 - 3 years	Count	Percent of Question Respondents
Low	37	100.00%
Total	37	

Survey Participants:	40
Question Respondents:	37
No Response Count:	3
Response Rate:	92%