



COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

*REPORT ON SPARWOOD BUSINESSES
WINTER 2015*



COLUMBIA BASIN
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The Sparwood Business Retention and Expansion project is a community-driven effort undertaken by the District of Sparwood focused on identifying the needs of our existing businesses. The project was undertaken with support from the Sparwood Chamber of Commerce.

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 65 businesses in the District of Sparwood between 2013 and 2014. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

KEY RESEARCH FINDINGS

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Retail Trade', 'Construction' and 'Professional, Scientific and Technical Services' under the North American Industry Classification system.
	Market opportunities was the most frequently cited reasons given for businesses to locate in Sparwood.
	Most companies have been in business for more than 20 years.
	Nearly half of the companies are 'growing'.
Local Workforce	Respondents reported a total of 2140 employees; the population of Sparwood is 3,823.
	The majority of employees are full-time.
	First Aid and WHMIS as well as Business Management were most commonly listed as key training areas.
Sales	26% of businesses expect that their sales will grow by between 10 and 24% over the next year.
	30% of businesses have their sales generated by their top 3 customers.
	Over half of businesses report that their sales are to customers within the community or region.
	Businesses would like to source office supplies, light bulbs, and concrete supplies from local suppliers.
Facilities and Equipment	48% of businesses own the facility in which they operate.
	Nearly half of businesses plan to expand within 3 years, with most indicating that expansion will occur within the community.
	Top barriers to expansion are lack of suitable premises and lack of skilled staff.
Government Services	Top rated government services include access to highways and roads, access to markets and availability of road transport services. The lowest ratings include availability of buildings for lease or purchase, access to airport facilities and availability of appropriately zoned land.
	Improving access to land for development, improvements to the development approval processes, and improvements to curbside recycling are the government services most in need of improvement
	The Calgary International 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 local government and the workforce quality.
	Businesses most commonly listed Sparwood's proximity to Alberta and the United States, as well as its proximity to mines as its greatest strength as a place to do business.
	The business competitiveness factors that are most important to respondents include availability of telecommunications, infrastructure and services, improvement of customer service, and workforce skill development.
Assessment and Plans	The overall health of their company was rated as excellent by 45% of businesses, and good by 32% of businesses.
	Only 2% of businesses are at a high risk of closing or downsizing.

NEXT STEPS AND POTENTIAL ACTIONS

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

Local Workforce

With a population of 3,927¹, and a total of 2,140 employees reported by businesses surveyed², there is an indication that there may be a number of employees travelling from outside of Sparwood to work within the District. Actions related to this theme include exploring ways in which those employees can be engaged and or retained within the community. Related, are the critical considerations for employees identified which include housing, cost of living and childcare.

Youth Employment

The data indicates that employees under the age of 26 are in the minority. Increasing youth involvement in the local workforce could be encouraged through a better understanding of 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

45% of businesses in the region report being in a growth cycle, and 43% indicate that they are planning to expand within the next three years. Close to half of those businesses planning to expand do not feel their existing site is adequate, and that the majority of expansion plans will occur within the community. Assistance could come in the form of navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion

¹ Source: BC Stats (2013). Population Estimates: Municipalities, Regional Districts and Development Regions 2011 - 2014

² Note: 2,140 is the total number of employees/jobs in reported by businesses surveyed as part of this Business Retention and Expansion survey. There are businesses in Sparwood that were not surveyed under this project, jobs with those businesses are not reflected in this report.

projects. Improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions. These potential actions and any others, should be designed to address the stated barriers to expansion which include lack of suitable premises and lack of skilled staff.

Economic Diversification

A lack of diversification was cited most frequently by local businesses as one of Sparwood's greatest weaknesses and its greatest barrier to growth. Businesses identified manufacturing, restaurants and tourism as the most important sectors to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, construction and forestry. Actions to increase diversification could include working with local businesses to expand their customer base and increasing small business support programs, as well as working with industry in key areas to increase diversification of the local economy.

Findings indicate that the majority of supplies come from outside the local region, and only 17% of supplies are sourced locally. The most common response (44%) for the reason why supplies are sourced outside of the local area is that they are not available locally. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally.

Local businesses do not appear to engage with government procurement processes, with only 10% of businesses indicating that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

A lack of technical training and colleges/universities were cited as factors contributing to a poor business climate. Businesses identified that training was needed in the areas of emerging technologies, skilled trades and health and safety. Improving technical training and workforce skill development is important for business competitiveness. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of both business and the community. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses.

Government Services

A recurring theme was the lack of buildings and land available for lease or purchase. With a large number of businesses planning expansions contingent on finding new space, there is an opportunity for the local government to work with local businesses to understand existing and

future business needs and assess land use planning at a micro level. Issues around the perceived lack of available land and servicing costs may be addressed through communication strategies between the local government, local businesses and the community. Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

TABLE OF CONTENTS

Executive Summary	ii
Key Research Findings	ii
Next Steps and Potential Actions	iii
List of Figures	vii
Project Overview	1
The BRE Concept	1
Project Objectives	1
Research Considerations	1
The BRE Survey	1
The Data Set	2
Data Collection	2
Data Input, Analysis and Reporting	2
Research Findings	3
Company Information	3
Local Workforce	10
Sales	20
Facilities and Equipment	25
Government Services	33
Business Climate	38
Assessment and Plans	51
Recommendations	54
Next Steps	54
Potential Action Areas	55
Appendix A: Data Tables	59
Company Information	59
Local Workforce	64
Sales	76
Facilities and Equipment	81
Government Services	88
Business Climate	91
Assessment and Plans	103

LIST OF FIGURES

Figure 1: Industry classification	3
Figure 2: Facility function(s)	4
Figure 3: Location of primary competitors.....	4
Figure 4: Key words and responses respondents' discussions of the factors that make them successful in this region.....	5
Figure 5: Why did you choose this community to locate your business?	6
Figure 6: Other Locations	6
Figure 7: Location of Other Locations	6
Figure 8: Location of headquarters	7
Figure 9: Life cycle stage.....	7
Figure 10: Length of time in business.....	7
Figure 11: Type of business	8
Figure 12: Ownership and management changes in last 5 years.....	8
Figure 13: Anticipated timeline for ownership change	9
Figure 14: Anticipated exit strategy	9
Figure 15: Existence of formal succession plan.....	9
Figure 16: Existence of current business plan	10
Figure 17: Total number of employees	10
Figure 18: Nature of employment.....	11
Figure 19: Historical Employment trend	11
Figure 20: Full-time employment trend over last 3 years	11
Figure 21: Full time employment trend over next 3 years.....	12
Figure 22: Age of the majority of essential employees.....	12
Figure 23: Wages in relation to other businesses in the region.....	13
Figure 24: Trend in unfilled positions.....	13
Figure 25: Location of workforce recruitment	13
Figure 26: Recruitment and retention challenges.....	14
Figure 27: Key words and responses in respondents' discussion of retention efforts	14
Figure 28: Recruitment Activities	15
Figure 29: Current recruitment areas.....	15
Figure 30: Future areas where recruitment may be challenging	16
Figure 31: Strategies to overcome employee recruitment challenges	16
Figure 32: Skill level of majority of workforce.....	17
Figure 33: Training Budget	17
Figure 34: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills	17
Figure 35: Training or professional development needs.....	18
Figure 36: Areas for new Training in next five years	18
Figure 37: Preferred modes of training	19
Figure 38: Usual training locations.....	19
Figure 39: Critical considerations for employees.....	20
Figure 40: Annual sales.....	20
Figure 41: Status of market for product/service	21
Figure 42: Market Share in Comparison to Competitors	21
Figure 43: Projected sales growth in the next year.....	21
Figure 44: Historic sales trend at this location	22
Figure 45: Historic sales trend at parent company	22

Figure 46: Historic sales trend within the industry	22
Figure 47: Historical export sales trend.....	23
Figure 48: Sales generated by top 3 customers	23
Figure 49: Geographic source of majority of sales.....	24
Figure 50: International trade status.....	24
Figure 51: Engagement with government procurement processes.....	24
Figure 52: Geographic source of majority of supplies.....	25
Figure 53: Reason for out-of-area purchasing.....	25
Figure 54: Size of facility.....	26
Figure 55: Condition of facility	26
Figure 56: Condition of equipment	26
Figure 57: Ownership status of facility.....	27
Figure 58: Length of time remaining on lease.....	27
Figure 59: Historical Investment in facility (past 18 months).....	28
Figure 60: Room for expansion	28
Figure 61: Plans to expand within three years.....	28
Figure 62: Adequacy of current site to support expansion	29
Figure 63: Expansion to occur in community	29
Figure 64: Estimated expansion investment	30
Figure 65: Component of expansion budget for equipment and technology.....	30
Figure 66: Component of expansion budget for real estate	30
Figure 67: Size of facility expansion	31
Figure 68: Recent facility upgrades	31
Figure 69: Planning facility upgrades.....	31
Figure 70: Barriers to expansion.....	32
Figure 71: Organizations approached for expansion assistance	32
Figure 72: Considering energy efficiency in expansion plans.....	33
Figure 73: Awareness of BC Hydro Power Smart	33
Figure 74: Rating of government services.....	35
Figure 75: Key words and responses in respondents' suggestions for improvements to government services	37
Figure 76: Airport service used.....	37
Figure 77: New services at local airport (Canadian Rockies International Airport)	38
Figure 78: Rating of local business climate	38
Figure 79: Rating of business climate factors.....	39
Figure 80: Business climate today vs. 5 years ago.....	41
Figure 81: Business climate 5 years from today.....	41
Figure 82: Community's strengths as a place to do business.....	42
Figure 83: Community's weaknesses as a place to do business.....	43
Figure 84: Barriers to growth in the community.....	44
Figure 85: Level of service from business support providers	45
Figure 86: Potential Suppliers.....	46
Figure 87: Supply to local companies	47
Figure 88: Sectors, businesses or industries that could be attracted to region.....	47
Figure 89: Importance of business competitiveness factors.....	48
Figure 90: Performance on key productivity drivers.....	49
Figure 91: Economic drivers with greatest growth potential.....	50
Figure 92: Impact of Proximity to Alberta	51
Figure 93: Facility's overall health	51

Figure 94: Overall health of parent company	52
Figure 95: Local management's attitude toward community	52
Figure 96: Parent company's attitude toward local community.....	52
Figure 97: Risk of facility closing.....	53
Figure 98: Risk of facility downsizing.....	53

PROJECT OVERVIEW

This report describes findings from a Business Retention and Expansion (BRE) survey³ conducted in the District of Sparwood during 2013/2014. The Business Development Liaison at The District of Sparwood acted as the community lead for the project. The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

THE BRE CONCEPT

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

PROJECT OBJECTIVES

Objectives specific to the Sparwood BRE project were as follows:

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

RESEARCH CONSIDERATIONS

THE BRE SURVEY

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data presented in this report were collected as part of a comprehensive BRE survey that is aligned with surveys conducted by other participants in the

³ Short and Long BRE surveys can be downloaded from: <http://cbrdi.ca/research-areas/applied-research/business-retention-expansion/>

BC Business Counts program across the province of BC. Survey data can therefore be analyzed at a community, sub-regional, regional and provincial level.

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

THE DATA SET

To generate an initial set of potential research participants, local business license databases and the Chamber of Commerce membership list was utilised.

Invitations to participate were extended to all businesses via personal letters sent out from the District of Sparwood Business Development Liaison. Following this communication follow up calls were made to arrange interviews.

In addition to face to face interviews, the option to participate via an online survey was offered.

Businesses were surveyed in two different ways: individual face-to-face interviews and an online survey. 18 respondents chose the online survey, while 47 respondents were individually interviewed. In total 65 respondents participated in the BRE survey. The number of respondents to each question varies depending on whether they participated in the online survey, or the structured individual survey, as some questions were omitted from the online survey. In addition, the number of respondents can vary based on responses to dependent questions.

DATA COLLECTION

The Business Development Liaison staff was solely responsible for the entire survey process. This included arranging and undertaking the structured interviews which took between 1 to 1.5 hours, plus data entry. In total the process took approximately 3 hours per interview.

DATA INPUT, ANALYSIS AND REPORTING

Data was entered into the ExecutivePulse system by the Business Development Liaison staff immediately following the interviews. To ensure confidentiality and data security, company-level data was only made accessible to RDI staff and the Business Development Liaison staff.

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

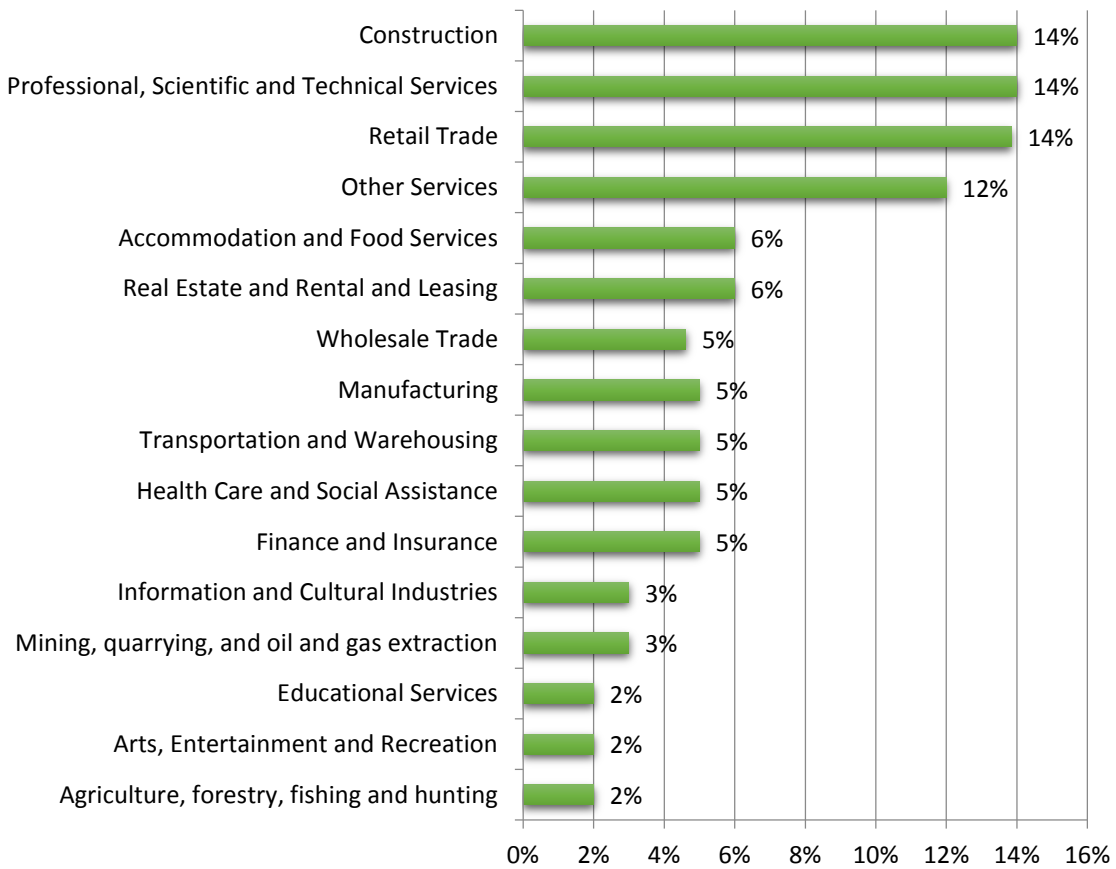
RESEARCH FINDINGS

COMPANY INFORMATION

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Construction (14% or 9 respondents), Professional, Scientific and Technical Services (14% or 9 respondents), and Retail Trade (14% or 9 respondents).

Figure 1: Industry classification

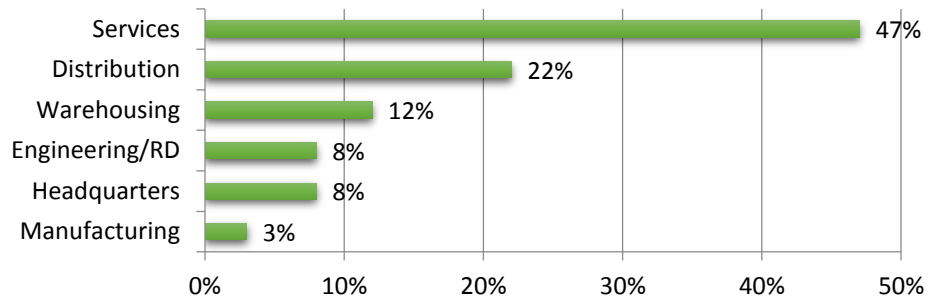


Note: 65 respondents

Facility Function

The majority of respondents (47% or 35 respondents) indicated that their facility provides services. Other primary functions include distribution (22% or 16 respondents) and warehousing (12% / 9 respondents). Fewer respondents indicated that their facility serves as company headquarters, engineering/R&D or for manufacturing purposes.

Figure 2: Facility function(s)

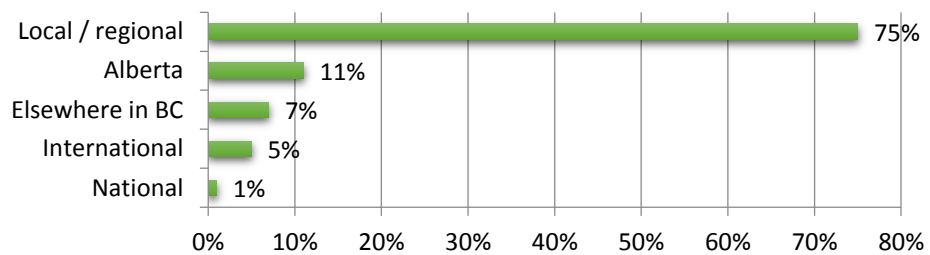


Note: 47 respondents

Competition

The vast majority of competition (75 % or 55 responses) reported was coming from the local or regional area⁴.

Figure 3: Location of primary competitors



Note: 47 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 11 businesses) cited Location. Service (19% or 10 businesses), strong community (12% or 6 businesses), and limited competition (10% or 5 businesses) were also discussed frequently.

“Give 100%, open and honest and provide a good service.”

“Ability to service the mines well.”

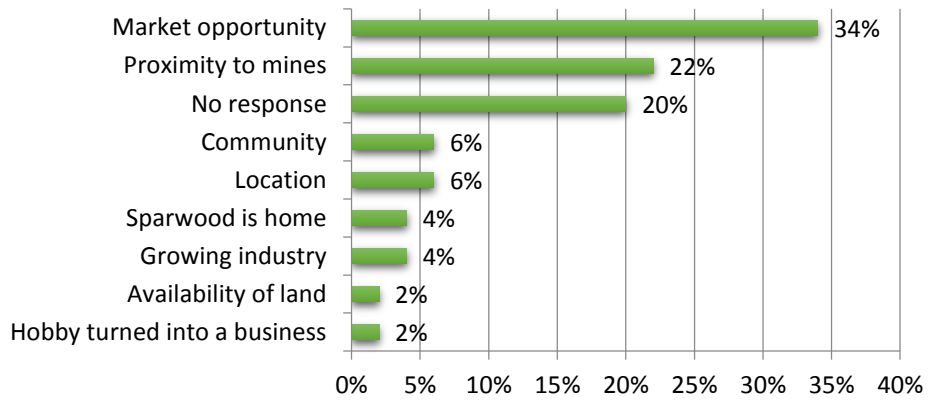
“Businesses are interdependent in this community. Work closely with other companies and work with the mine. Family-based business, has gained trust from the community and grown with the community.”

“Location. Reasonable tax base and the ability to service a variety of regional locations from one site.”

Choosing Sparwood

The market opportunities (34% or 17 respondents) and the proximity to mines (22% or 11 respondents) were the most frequently cited reasons given for businesses to locate in Sparwood.

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

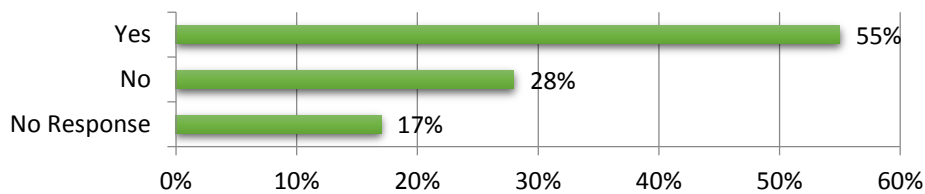


Note: 47 respondents

Other Locations

55% of respondents (26 respondents) indicated that their company has other locations.

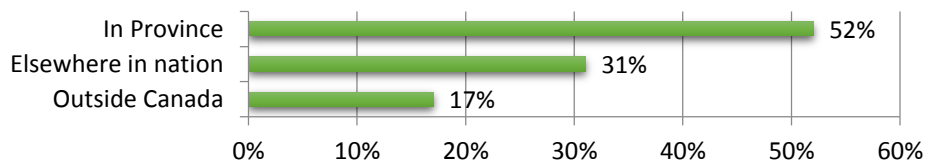
Figure 6: Other Locations



Note: 47 respondents

52% of those other locations (22 respondents) are in other areas of the province, 31% (13 respondents) are in other parts of Canada and 17% (7 respondents) indicated that their company has another location outside of Canada.⁵

Figure 7: Location of Other Locations

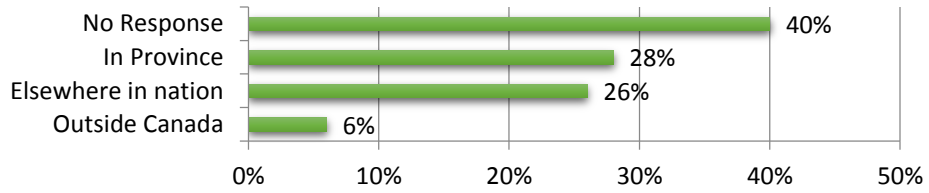


Note: 26 respondents

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.

28% (13 businesses) of respondents reported that their headquarters are located in British Columbia, 26% (12 businesses) indicated that they are headquartered elsewhere in Canada and 6% (3 businesses) indicated that their headquarters are located in another country.

Figure 8: Location of headquarters

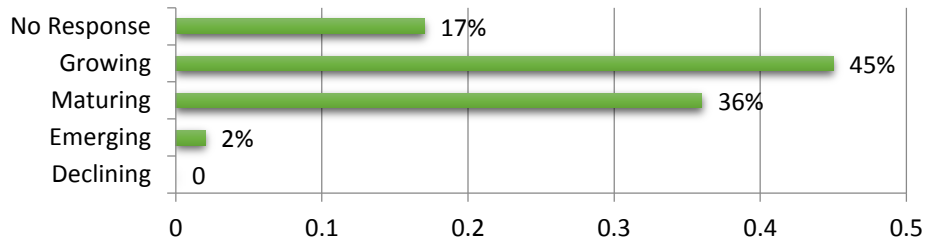


Note: 47 respondents

Age and Life Cycle Stage

Nearly half of respondents (45% or 21 respondents) reported that their business is in the 'growing' life cycle stage. Another 36% (17 businesses) indicated that their business is in the 'maturing' stage. Only 2% (1 business) indicated that they are in the 'emerging' stages, and no businesses indicated that they were declining.

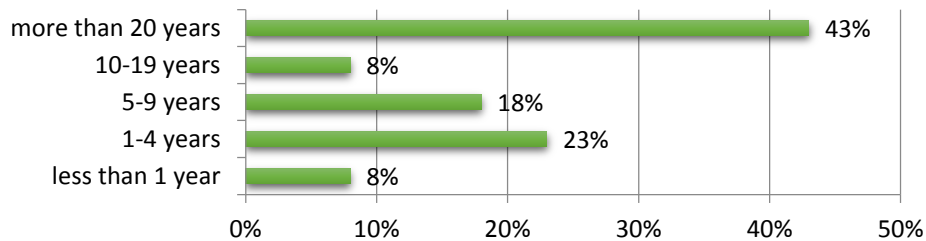
Figure 9: Life cycle stage



Note: 47 respondents

Most businesses (28 respondents or 43%) reported that they have been in business for more than 20 years. A significant number have reported that they have been in business for 1 – 4 years (15 respondents or 23%) and 5 – 9 years (12 respondents or 18%).

Figure 10: Length of time in business

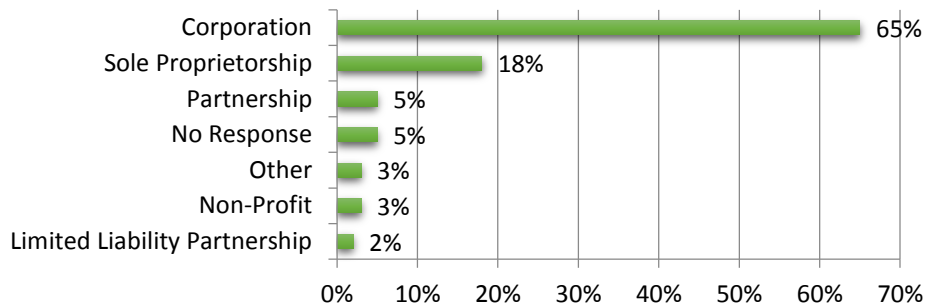


Note: 65 respondents

Ownership and Management

Most respondents (42 respondents or 65%) indicated that their business is classified as a corporation, while 18% (12 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (3 respondents), non-profit (2 respondents), other type of business (2 respondents), or limited liability partnership (1 respondent).

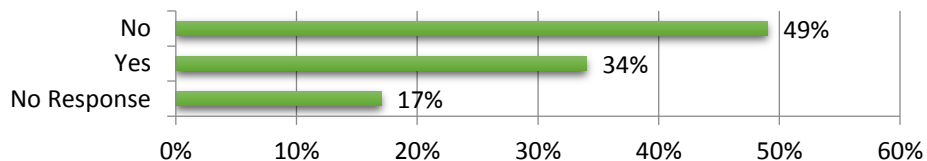
Figure 11: Type of business



Note: 65 respondents

49% of businesses (23 businesses) have not seen a management or ownership change in the last 5 years, while 34% of businesses (16 businesses) have changed management and/or ownership over that same period of time. Six businesses (9%) are expecting an ownership change in the near future. Of the 16 respondents that have seen changes in management and or ownership, 56% (9 businesses) report that change has had a positive impact.

Figure 12: Ownership and management changes in last 5 years

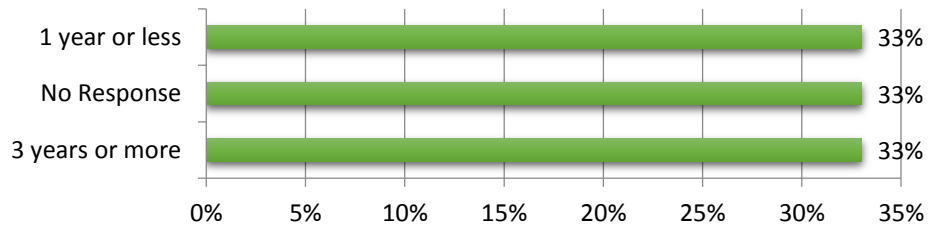


Note: 47 respondents

Succession and Business Plans

Of the six businesses that responded and reported a pending ownership change, 2 expect the change will happen in a year or less and 2 expect the process to take 3 years or more.

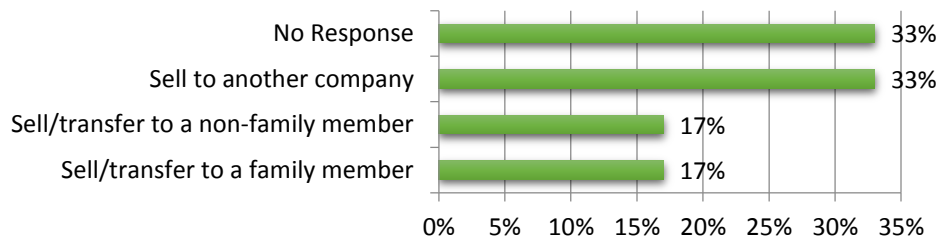
Figure 13: Anticipated timeline for ownership change



Note: 6 respondents

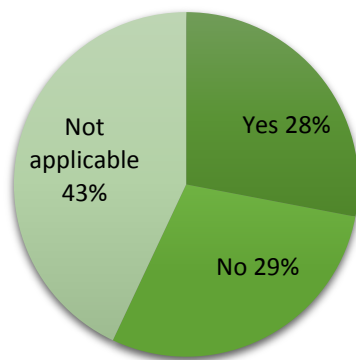
33% of respondents (2 respondents) expect that the current owner will exit the business by selling it to another company, while only 17% (1 respondent) expect it to be sold/transferred to either a family member or non-family member.

Figure 14: Anticipated exit strategy



Note: 6 respondents

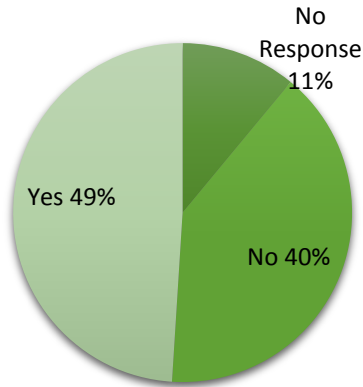
Figure 15: Existence of formal succession plan



Only 28% (18 respondents) of respondents reported that they have a formal succession plan in place.

Note: 65 respondents

Figure 16: Existence of current business plan



Nearly half of all respondents (32 respondents) indicated that they have a business plan in place.

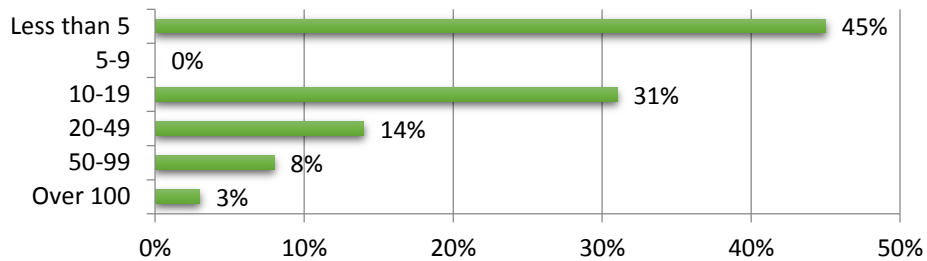
Note: 65 respondents

LOCAL WORKFORCE

Size of Workforce

The 65 businesses interviewed reported a total of 2,140 employees⁶. 45 % or 29 of the businesses surveyed indicated that they have less than five employees and just 3% or 2 of the businesses indicated that they have over 100 employees.

Figure 17: Total number of employees

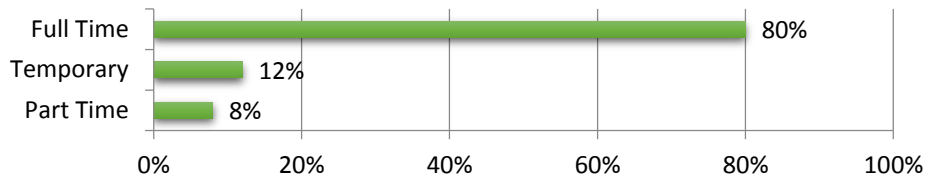


Note: 65 respondents

80% (1,712) of employment positions at surveyed businesses are full-time, while only 8% (169) are part-time and 12% (259) are temporary.

⁶ The employee count for one employer was averaged between two disparate numbers given.

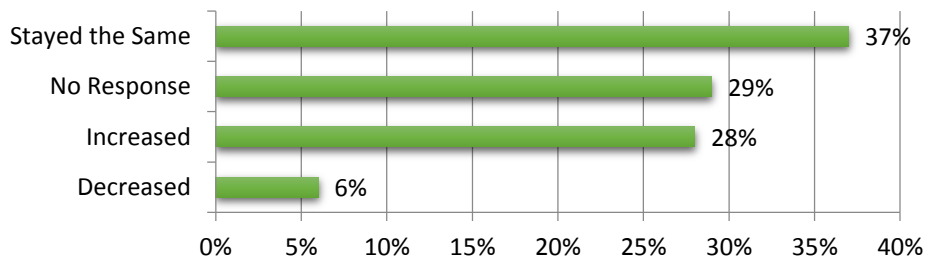
Figure 18: Nature of employment



Note: 65 respondents

37% of respondents (24 businesses) indicated that the number of employees at their business has stayed the same historically. While 29% (19 businesses) indicated that the size of their workforce has increased. Only 6% (4 businesses) indicated a decrease.

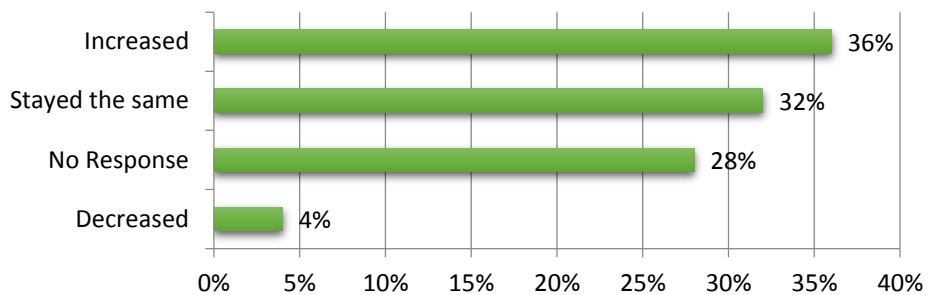
Figure 19: Historical Employment trend⁷



Note: 65 respondents

The last three years has seen increased and stable growth in the size of the full-time workforce, with 36% of businesses (17 respondents) reporting an increase in the number of employees, and 32% (15 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

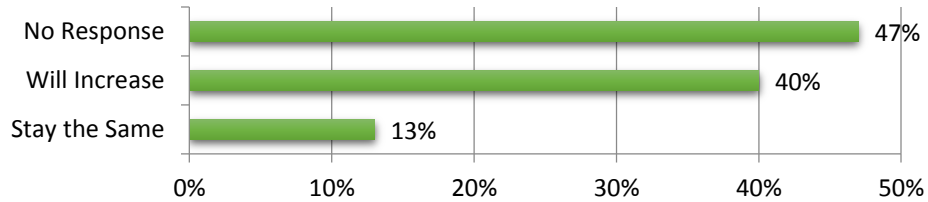


Note: 47 respondents

⁷ The question considered a 10 year historical trend.

40% of businesses (19 respondents) interviewed expect the size of their full-time workforce will increase over the next 3 years, while 13% (6 respondents) expect it to stay the same. No businesses indicated they expected a decrease over the next 3 years.

Figure 21: Full time employment trend over next 3 years

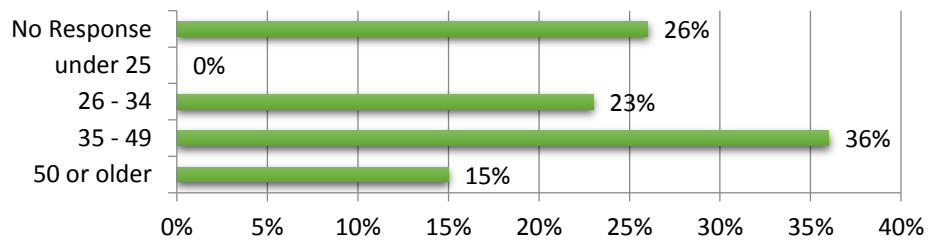


Note: 47 respondents

Workforce Demographics

Of the responses received, 36% (17 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



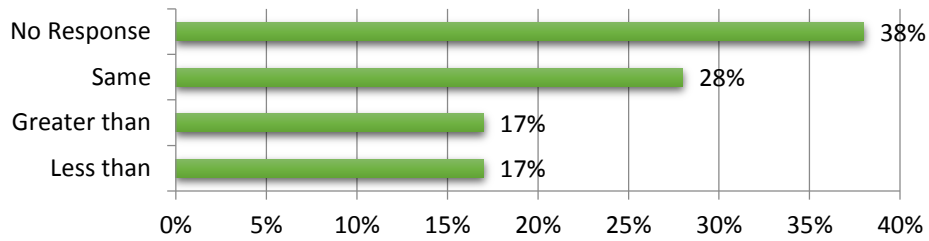
Note: 47 respondents

Wages

When reporting on average wages for skilled or professional workers, the majority of responses (35% or 23 businesses) indicated they pay between \$30 and \$49 per hour. The most commonly reported average wage for semi-skilled workers (25% or 16 businesses) was under between \$20 and \$29 and the most commonly reported average wage for entry-level workers (11% or 7 businesses of respondents) was \$20 to \$29. 28% of respondents (13 respondents) reported that their wage scale is similar to other businesses in the region.⁸

⁸ Detailed wage data is found in Appendix A.

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

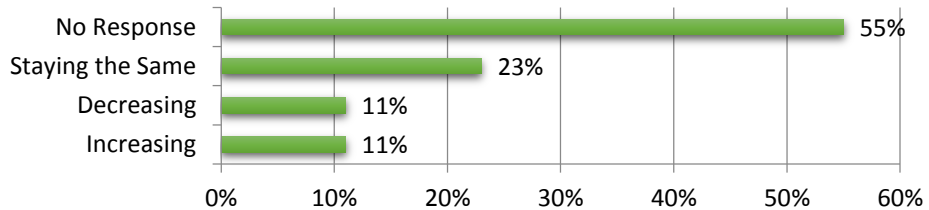


Note: 47 respondents

Recruitment and Retention

Of those businesses that responded, 23% (11 respondents) indicated that the number of unfilled positions at their company would remain constant.

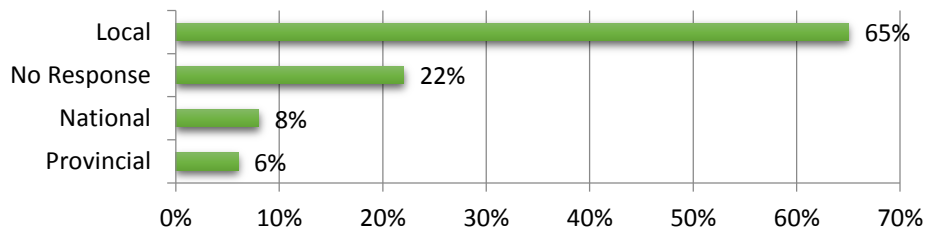
Figure 24: Trend in unfilled positions



Note: 47 respondents

The majority of respondents (65% or 42 respondents) reported that they primarily recruit employees from local labour markets. 8% (5 respondents) recruit nationally, while 6% (4 respondents) report that they recruit provincially. It is worth noting that no businesses reported international recruitment.

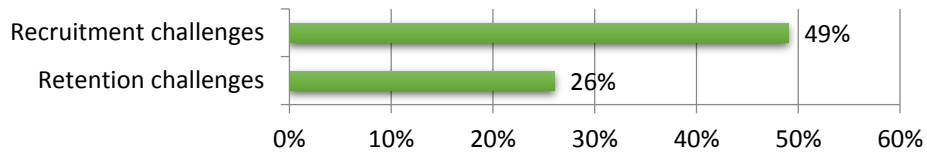
Figure 25: Location of workforce recruitment



Note: 65 respondents

Of the 65 respondents, 49% (32 respondents) indicated that they have experienced recruitment challenges and 26% (17 respondents) indicated that they have experienced retention challenges.

Figure 26: Recruitment and retention challenges



Note: 65 respondents

When asked what efforts their business has undertaken to retain employees, 44 businesses responded. The most frequent response was to provide flextime (13% or 6 respondents). Bonuses (9% or 4 respondents) and training opportunities (7% or 3 respondents) were other strategies employed. Other factors cited by businesses include offering benefits (4% or 2 respondents), pensions (4% or 2 respondents), health and wellness opportunities (2% or 1 respondent) and profit sharing (2% or 1 respondent).

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



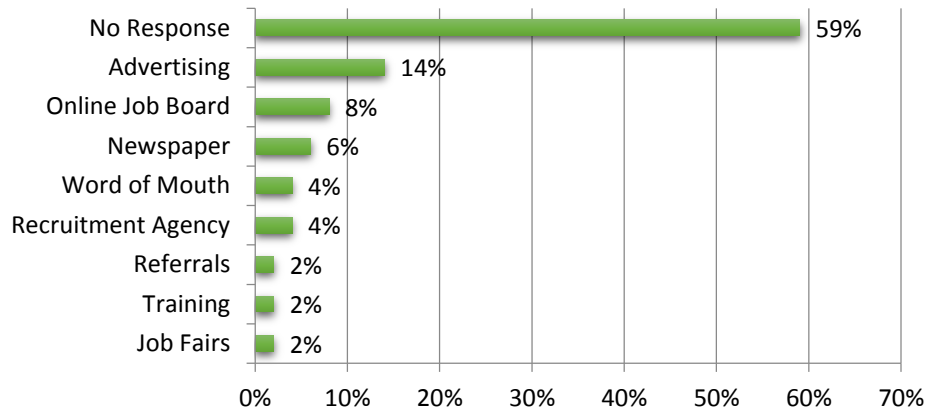
“Offer good flexibility and also make sure to treat staff well in all aspects of employment.”

“Involve staff in new business process so that they can select work that they enjoy doing.”

In their discussions of the reasons for their retention challenges, respondents most often cited competition from Teck, as well as competition from other employers where wages are higher.

When asked what efforts businesses have undertaken to recruit employees, efforts that emerged most often were advertisements (14% or 7 respondents), online job boards (8% or 4 respondents) and local newspapers (6% or 3 respondents). Respondents also cited using word of mouth, recruitment agencies, training, referrals and job fairs.

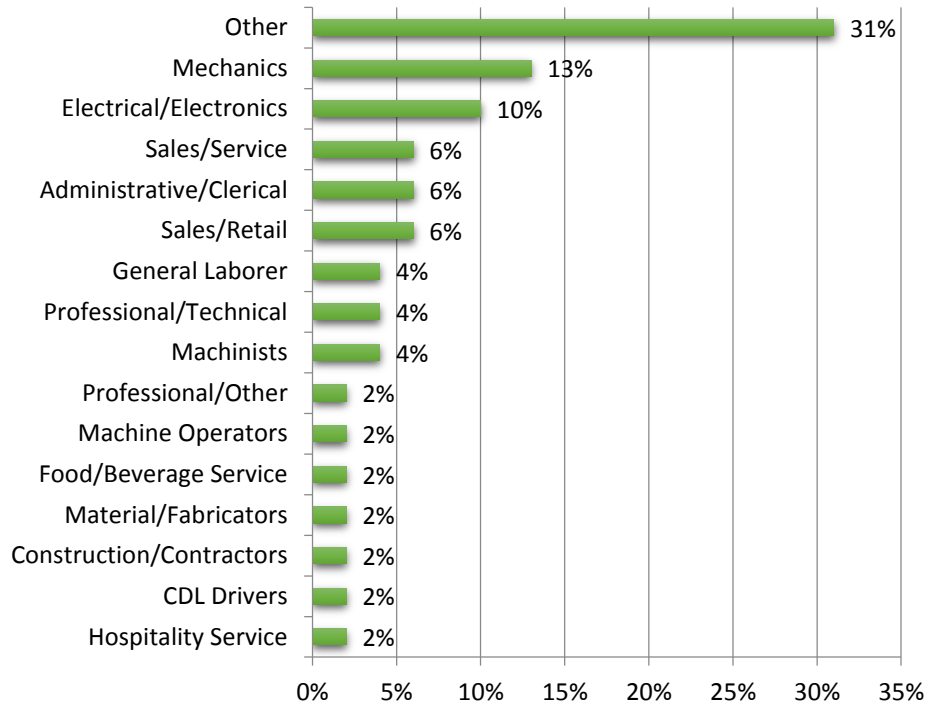
Figure 28: Recruitment Activities



Note: 44 respondents

Of the 27 companies that indicated they were experiencing recruitment challenges, the areas currently being recruited for among surveyed businesses include mechanics (13% or 6 respondents), electrical (10% or 5 respondents), sales/service, sales/retail, and administrative/clerical personnel were all cited by 6% or 3 respondents as current areas of recruitment. The responses included in the 'other' and 'professional other' categories charted below are detailed in Appendix A.

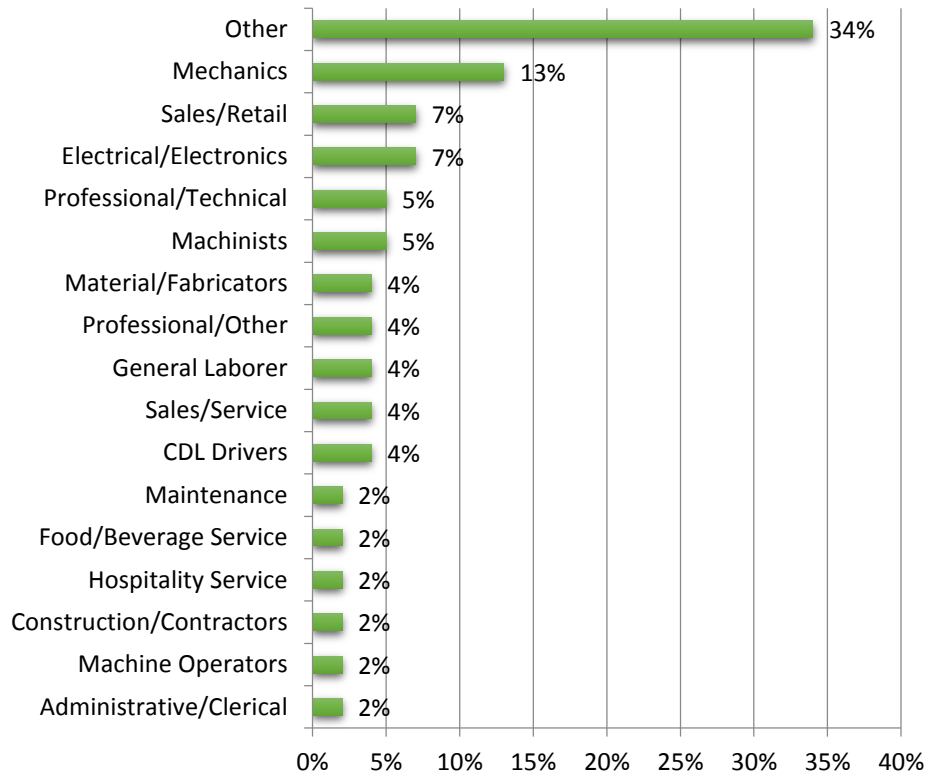
Figure 29: Current recruitment areas



Note: 27 respondents

52% of respondents (34 businesses out of 65 respondents) anticipate future recruitment difficulties. The most commonly anticipated recruitment areas which may prove challenging include mechanics (13% or 7 respondents), sales/retail and electrical/electronics (7% or 4 respondents) and machinists and professional/technical (5% or 3 respondents).

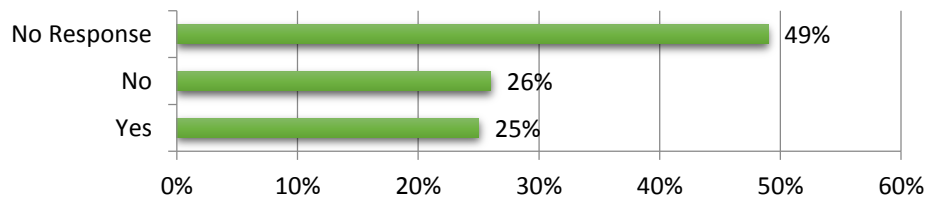
Figure 30: Future areas where recruitment may be challenging



Note: 28 respondents

25% of respondents (16 respondents) indicated that they believed that there were strategies that could be undertaken to address employee recruitment, however, few suggestions were available on what could be done to overcome employee recruitment issues. Only two suggestions were offered: provide a better community for families and encourage spouses to engage in the service sector.

Figure 31: Strategies to overcome employee recruitment challenges

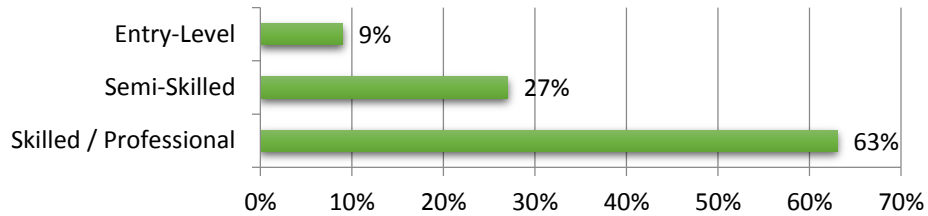


Note: 65 respondents

Skills and Training

The majority of respondents (63%) indicated that over half of their workforce is comprised of skilled or professional workers, 27% indicated that their workforce is mainly semi-skilled workers and 9% indicated that entry-level workers make up the majority of their workforce.

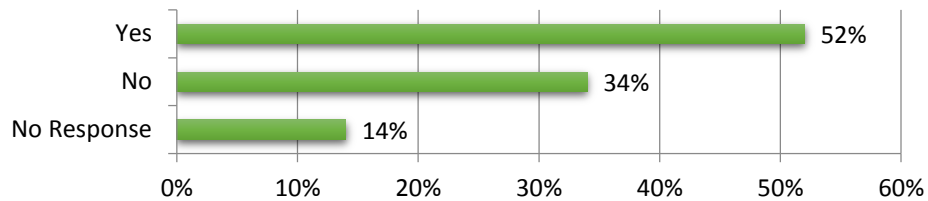
Figure 32: Skill level of majority of workforce



Note: 65 respondents

52% (34 businesses) indicated that there is a training budget to upgrade employee skills. 68% (32 businesses) indicated that their company offers in-house training and 49% (23 businesses) use contracted training.

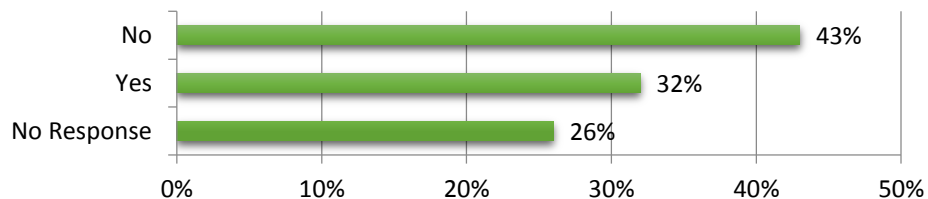
Figure 33: Training Budget



Note: 65 respondents

32% of respondents (15 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

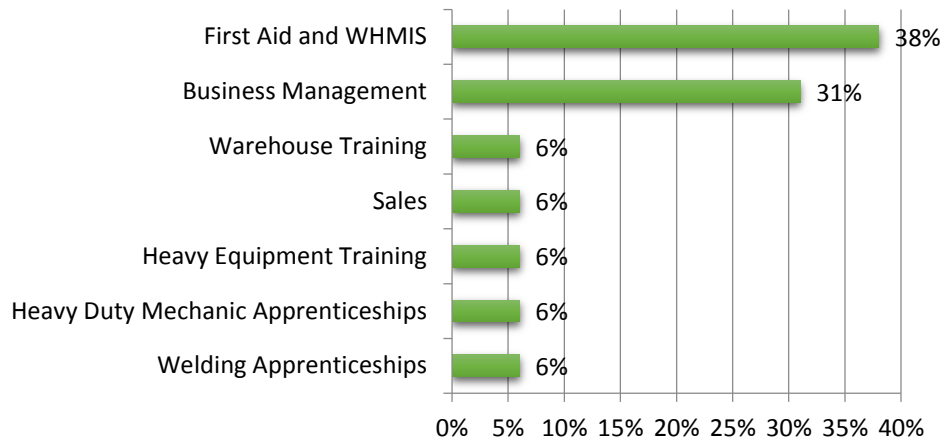
Figure 34: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 47 respondents

49% or 23 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were First Aid and WHMIS training (38% or 6 businesses) and business/management training (31% or 5 businesses). All other areas were tied with only one business (equivalent of 6%) listing these areas of training need.

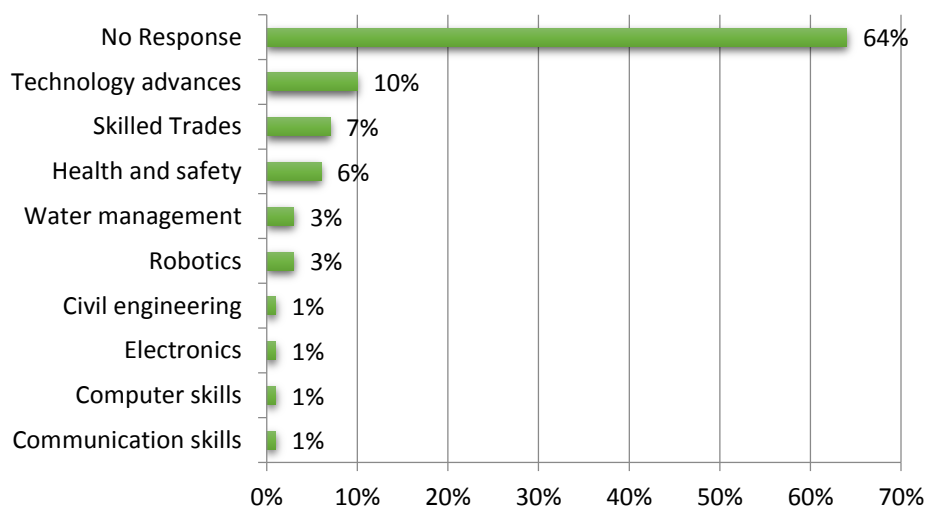
Figure 35: Training or professional development needs



Note: 47 respondents

When asked what new training might need to be considered in the next five years, the most commonly cited response was in the area of technological advances (10% or 7 businesses). Other areas where training will be needed include skilled trades (7% or 5 businesses) and health and safety (6% or 4 businesses).

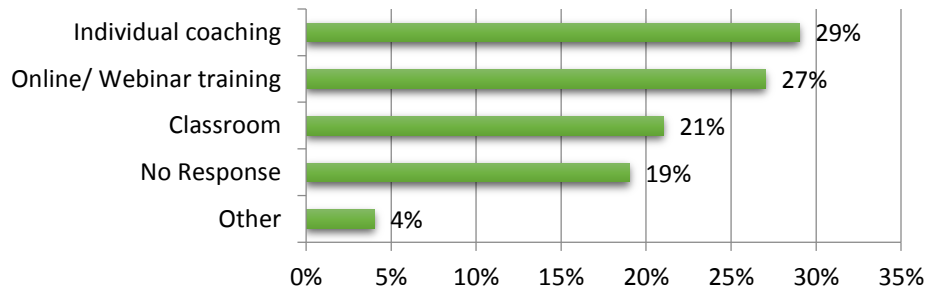
Figure 36: Areas for new Training in next five years



Note: 65 respondents

29% of respondents (22 businesses) stated that they prefer training when it is delivered through an individual coaching format, while 27% (20 businesses) preferred online or a webinar style format, 21% or 16 businesses expressed a preference for classroom style training.

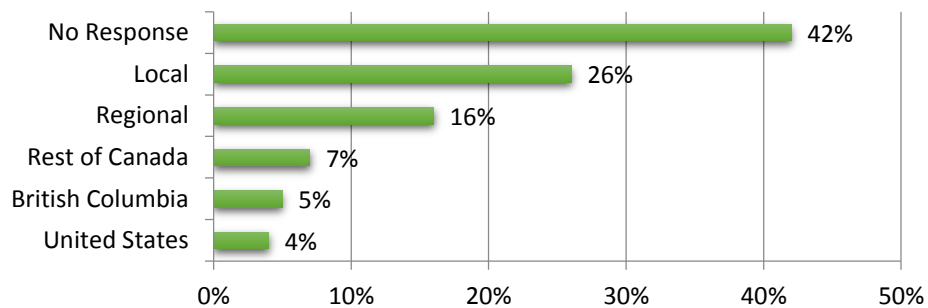
Figure 37: Preferred modes of training



Note: 47 respondents

26% of respondents (15 businesses) typically seek training opportunities that are offered locally, and 16% (9 businesses) travel to other areas in the region for their training. Fewer training opportunities are sought elsewhere in the province, country or in the United States.

Figure 38: Usual training locations



Note: 47 respondents

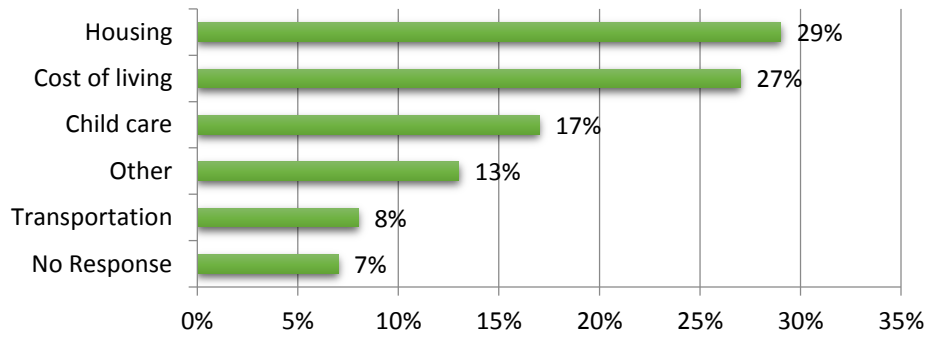
Unions

Seven businesses (15%) reported that they have union status.

Employees

The most frequently cited critical issues for employees is housing (29% or 35 businesses) and cost of living (27% or 32 businesses). Child Care (17% or 20 businesses) and Transportation (8% or 10 businesses) issues were also cited. For a list of factors included in the “other” category charted below, see Appendix A.

Figure 39: Critical considerations for employees



Note: 63 respondents

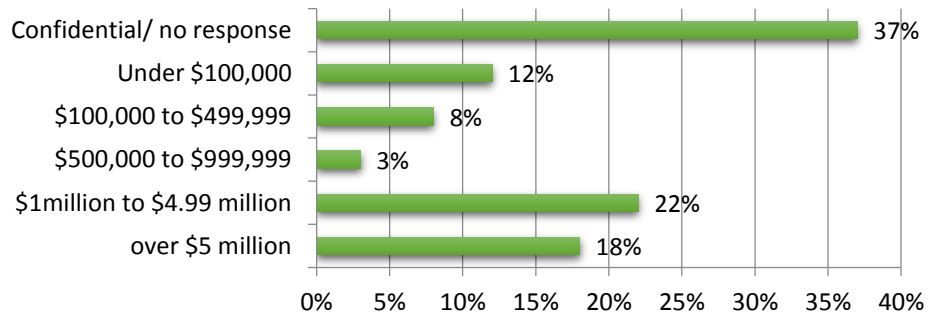
46% of businesses (29 businesses) interviewed reported that over 75% of their employees live within the community, 8% (5 businesses) indicated that 75% of the employees live elsewhere in the region and 2% (1 business) indicated that they live outside of the region.

SALES

Market Size and Share

The highest number of respondents (14 businesses or 22%) reported annual sales between \$1 million and \$4.99 million. The second highest number of respondents (12 businesses or 18%) reported annual sales over \$5 million. The lowest number (2 businesses or 3%) reported sales of between \$500,000 - \$999,999. 37% (24 businesses) of respondents did not share annual sales information.

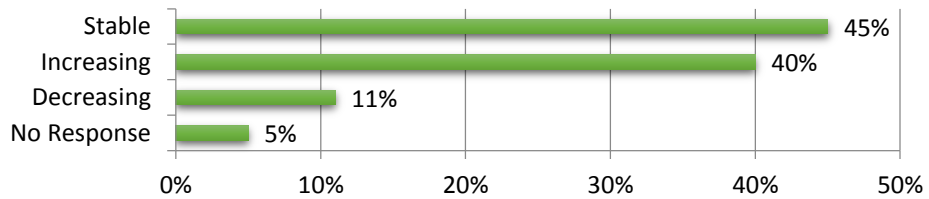
Figure 40: Annual sales



Note: 65 respondents

The majority of businesses interviewed (45% or 29 businesses) indicated that the size of the market for their product or service is stable. Another 40% (26 businesses), reported that the market is increasing.

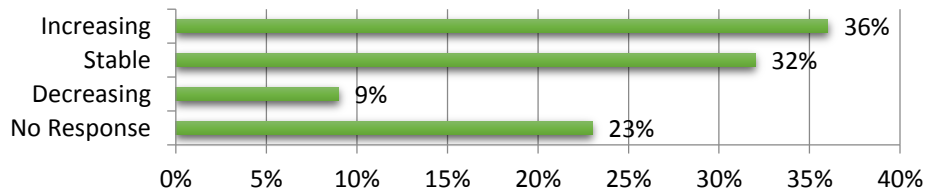
Figure 41: Status of market for product/service



Note: 65 respondents

36% (17 businesses) of respondents indicated that their share of the market for their product in comparison with their competitors is increasing, while 32% (15 businesses) indicated that it is stable. A small number of respondents (9% or 4 businesses) indicated that their market share is decreasing.

Figure 42: Market Share in Comparison to Competitors

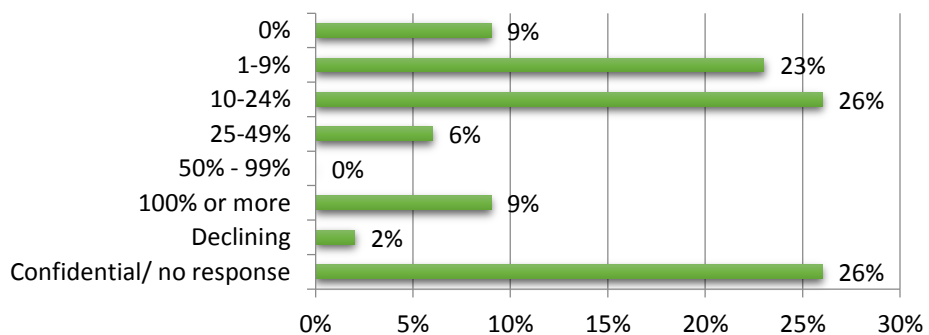


Note: 47 respondents

Growth

23% of respondents (11 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 23% of respondents (11 businesses). 9% of respondents (4 businesses) expect strong growth in the next year. 9% (4 businesses) of respondents expect their sales to remain stagnant, while a further 2% (1 business) expects sales to decline.

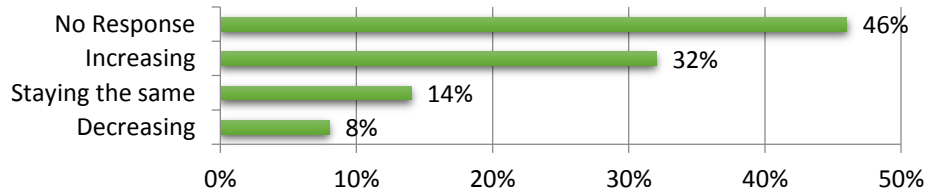
Figure 43: Projected sales growth in the next year



Note: 47 respondents

The majority of responses (32% or 21 businesses) indicated that sales at their business have increased over time, 14% (9 businesses) indicated that sales have remained relatively stable and 8% (5 businesses) reported that sales have declined.

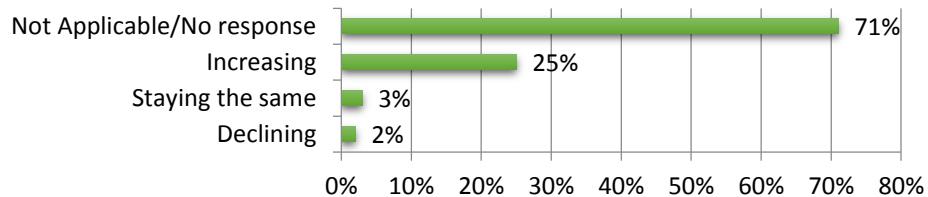
Figure 44: Historic sales trend at this location



Note: 65 respondents

Data indicates that the sales trend at parent companies is different from sales trends at this location. 25% or 16 businesses reported that sales at their parent company have historically increased and only 3% (2 businesses) reported that they have stayed the same, while 2% or 1 business reported a decline. It is worth noting that 71% of surveyed participants did not respond to this question.

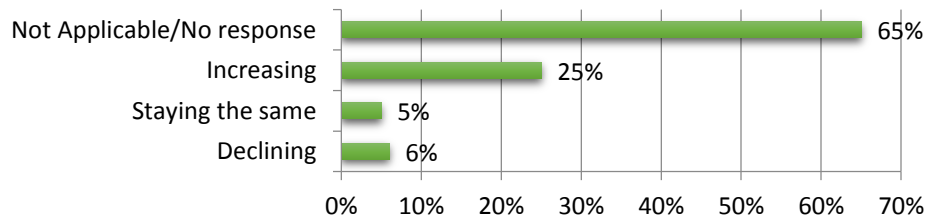
Figure 45: Historic sales trend at parent company



Note: 65 respondents

Data indicates that the sales trend within respondents' respective industries has followed the sales trend reported for parent company's. 25% percent of respondents (16 businesses) reported that sales within their industry have been increasing while 6% (4 businesses) reported that they have been decreasing.

Figure 46: Historic sales trend within the industry

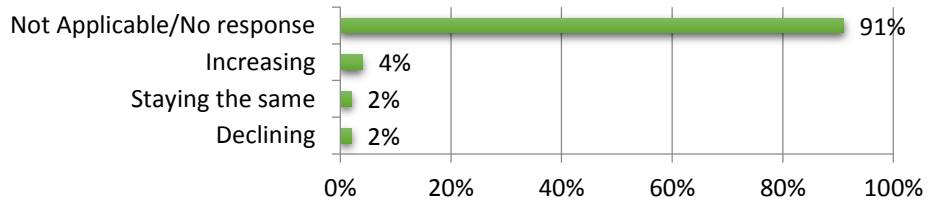


Note: 65 respondents

Anecdotal information provided indicates that sales for companies related to the coal mine are closely linked to the coal market and to mine activities.

Of the four businesses that reported exporting to international markets, 4% (2 businesses) indicated that their export sales have been increasing and 2% (1 business respectively) indicated that they have been stable or are in decline.

Figure 47: Historical export sales trend

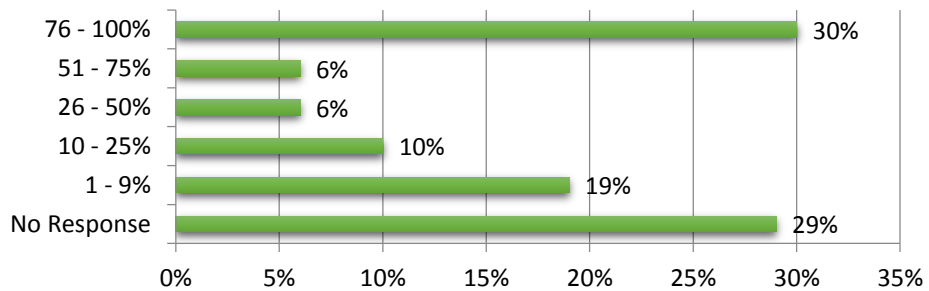


Note: 47 respondents

Source of Sales

The customer base among Sparwood businesses appears to be fairly reliant on a core customer base, with the largest percentage of respondents (30% or 19 businesses) indicating that 76% - 100% of their sales are generated by their top 3 customers. There does appear to be some diversity as indicated by the 19% of respondents (12 businesses) that indicated that less than 10% of their sales are generated by their top 3 customers.

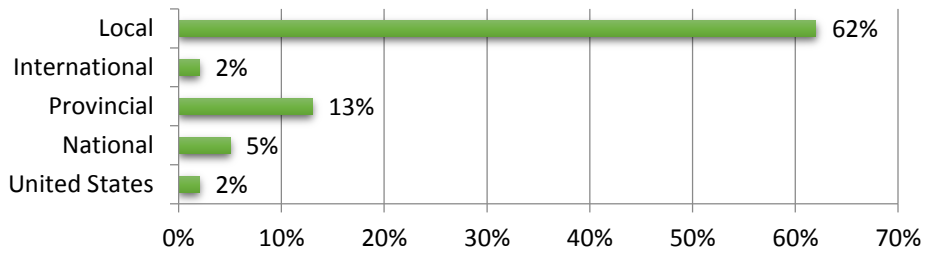
Figure 48: Sales generated by top 3 customers



Note: 63 respondents

A majority of respondents (62%) indicated that over 50% of their sales are to customers within the community or region. 13% indicated that over 50% of their sales are within the province. Fewer respondents (5%, 2%, 2%) indicated that the majority of their sales are to national, US or international markets, respectively.

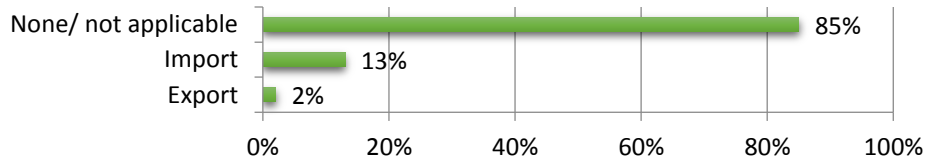
Figure 49: Geographic source of majority of sales



Note: 47 respondents

Six respondents (13%) indicated that they import goods or services from other countries and 1 respondent (2%) indicated that they export goods or services to other countries. 85% of respondents did not respond to the question, or stated they did not engage in international trade.

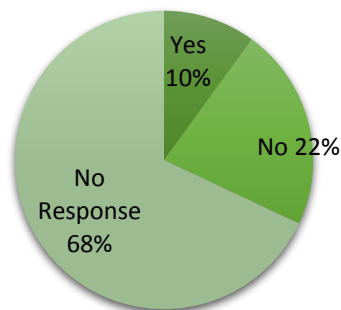
Figure 50: International trade status



Note: 47 respondents

Procurement

Figure 51: Engagement with government procurement processes

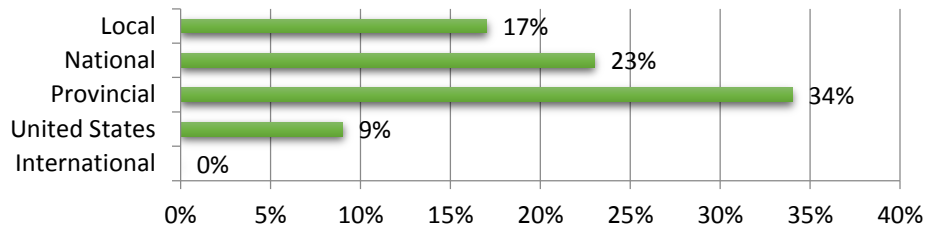


Of the 18 responses provided, only 10% indicated that they do engage in government procurement.

Note: 63 respondents

17% of respondents (6 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 34% (19 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 52: Geographic source of majority of supplies

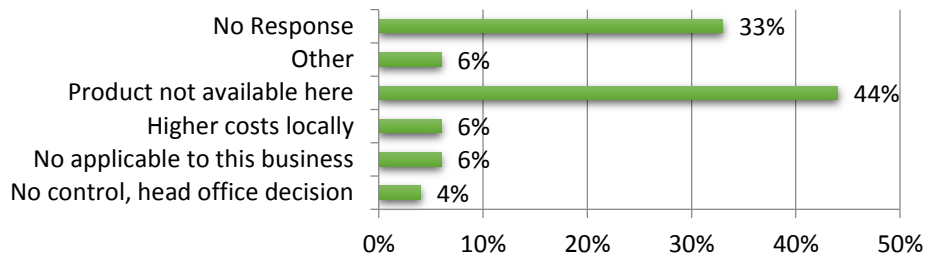


Note: 47 respondents

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (44% or 21 businesses) indicated that the products they need are not available locally.

Figure 53: Reason for out-of-area purchasing



Note: 44 respondents

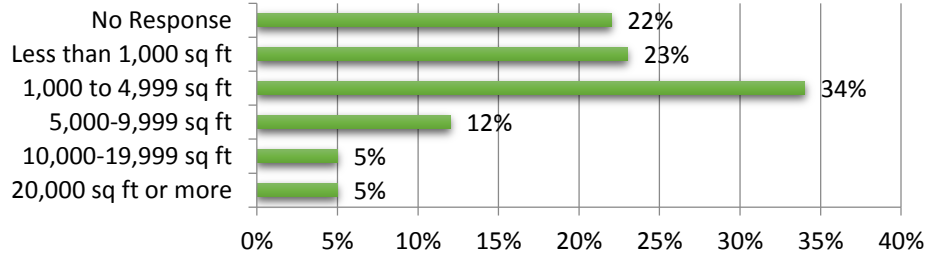
Products that businesses stated they would like to source from a local supplier include office supplies, light bulbs, and concrete supplies.

FACILITIES AND EQUIPMENT

Size and Condition

34% (22 businesses) of respondents reported that their facility is between 1,000 and 4,999 square feet in size, and another 23% (15 businesses) indicated it was less than 1,000 square feet.

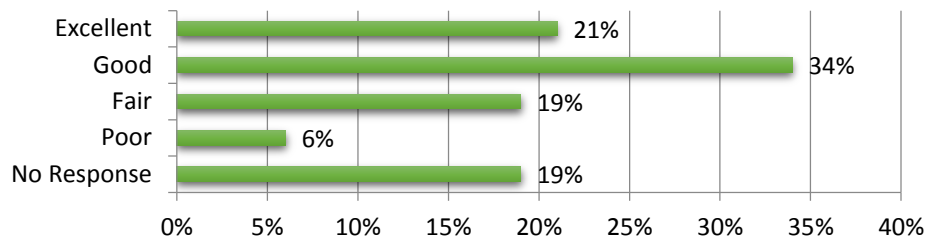
Figure 54: Size of facility



Note: 65 respondents

34% of respondents (16 businesses) indicated that their facility is in good condition. Another 21% (10 businesses) indicated that it is in excellent condition and 19% (9 businesses) reported that their facility is in fair condition. Only 6% (3 businesses) reported that their facility was in poor condition.

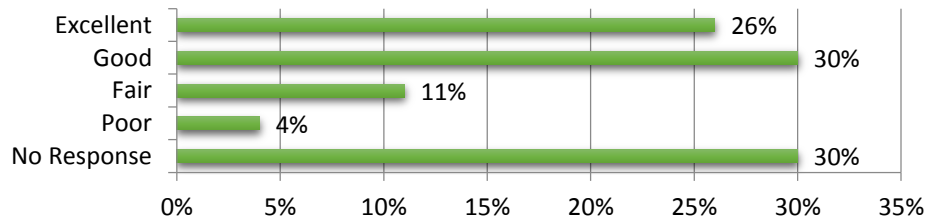
Figure 55: Condition of facility



Note: 47 respondents

26% (12 businesses) of respondents indicated that their equipment is in excellent condition. 30% (14 businesses) indicated that it is in good condition and 11% (5 businesses) report their equipment is in fair condition.

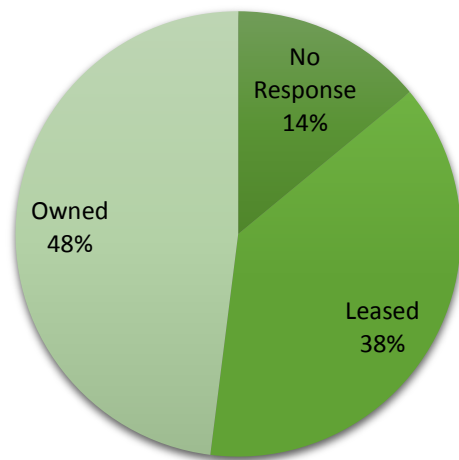
Figure 56: Condition of equipment



Note: 47 respondents

Ownership

Figure 57: Ownership status of facility

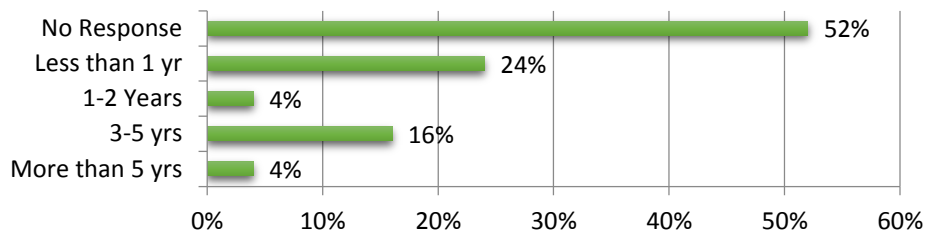


48% of respondents (31 businesses) own the facility in which they operate and 38% (25 businesses) lease it.

Note: 65 respondents

Of the 25 businesses that lease their facility, 24% have less than a year remaining on their lease and 16% have between 3 and 5 years remaining. The majority of respondents that lease their facility (64% or 16 businesses) intend to renew their current lease agreement.

Figure 58: Length of time remaining on lease

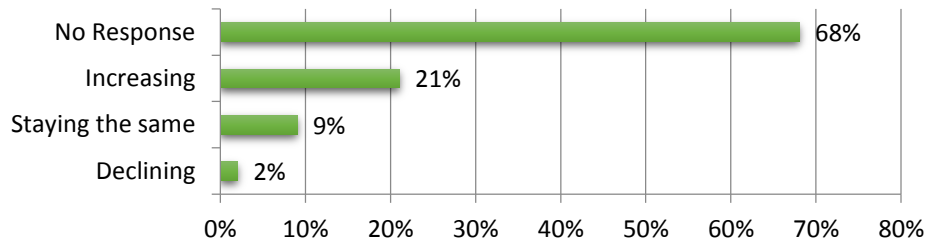


Note: 25 respondents

Investment and Expansion

21% of respondents (10 businesses) indicated that their company's investment in their facility has increased over the past 18 months, while just 9% or four businesses, indicated that the investment has stayed the same. Only one business (2%) indicated that investment in their facility has decreased over the same time period.

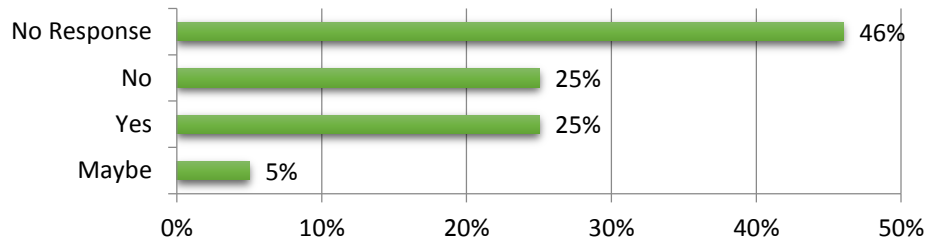
Figure 59: Historical Investment in facility (past 18 months)



Note: 47 respondents

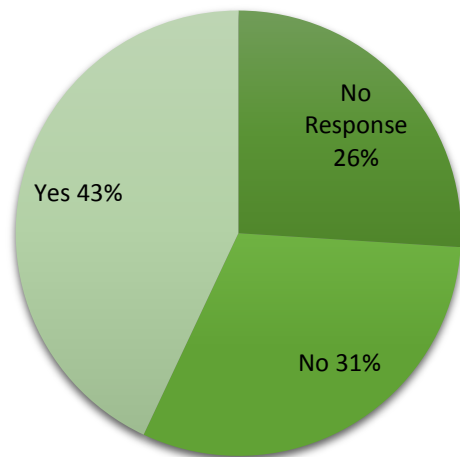
An equal number of respondents (25% or 16 businesses) indicated that there *was* room for expansion at their site, and that there *was not* room at their site.

Figure 60: Room for expansion



Note: 65 respondents

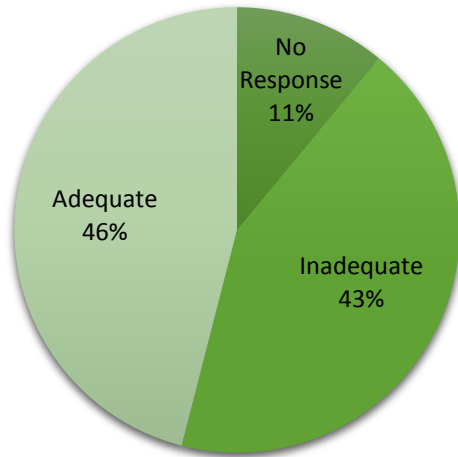
Figure 61: Plans to expand within three years



43% of respondents (28 businesses) plan to expand within three years, 31% (20 businesses) do not.

Note: 65 respondents

Figure 62: Adequacy of current site to support expansion

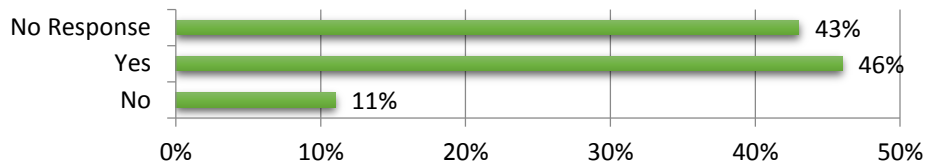


Of the 28 businesses planning expansion, 46% (13 businesses) reported that their current site will be adequate. Notably however, 12 businesses (43%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 28 respondents

Most respondents (46% or 13 businesses) indicated that expansion will occur within the community.

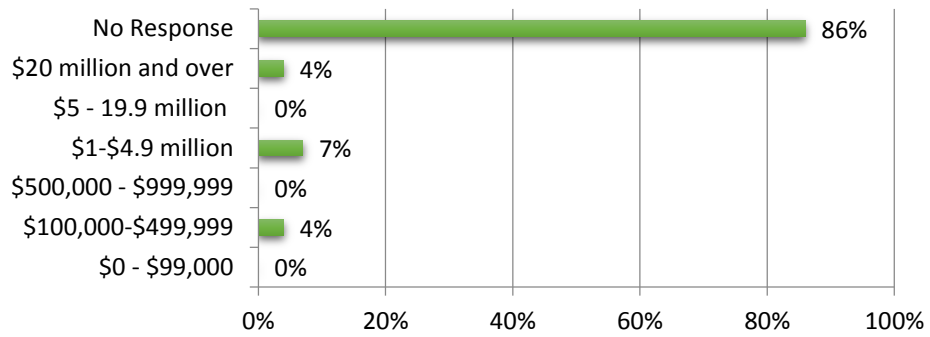
Figure 63: Expansion to occur in community



Note: 28 respondents

In total, 4 of the 28 businesses identified the approximate amounts they plan to spend on expansion related investments. A substantial investment is planned for 1 business, with a \$20 million investment planned, while 2 are planning investments in the range of \$1 – \$4.9 million, and finally 1 other business reported that it plans a relatively modest investment of between \$100,000 and \$499,999.

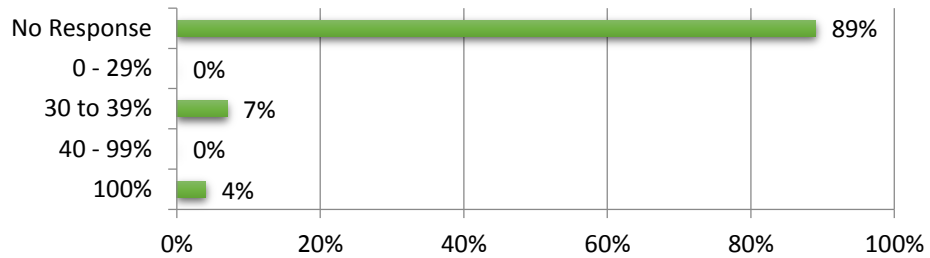
Figure 64: Estimated expansion investment



Note: 28 respondents

Of the 28 businesses planning expansion, two (7%) responded to state that they expect to spend 30 – 39% of their expansion budget on equipment and technology, while 1 (4%) responded to indicate their entire expansion budget will be devoted to equipment and technology.

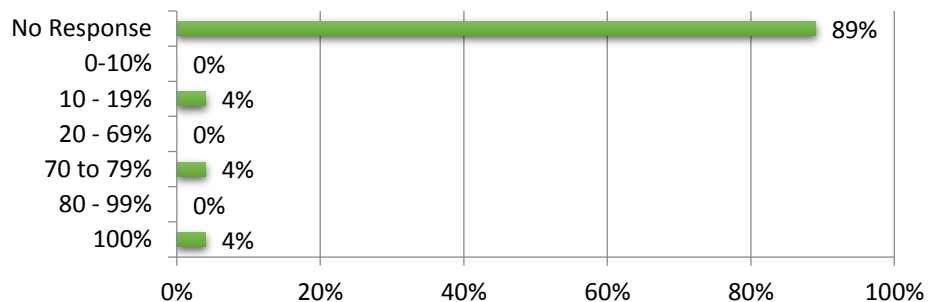
Figure 65: Component of expansion budget for equipment and technology



Note: 28 respondents

Of the 28 businesses planning investment in real estate, 1 respondent expects to spend between 10% and 19% of their expansion budget on real estate, while another business expects to spend between 70 – 79% and one business indicate it anticipates spending 100% on real estate.

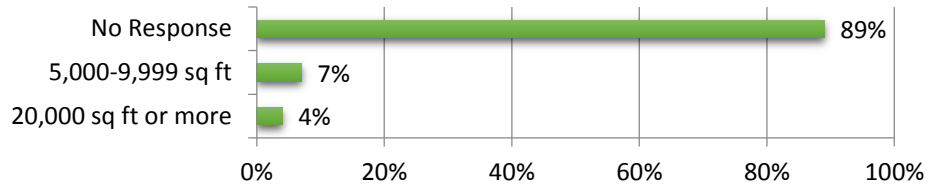
Figure 66: Component of expansion budget for real estate



Note: 28 respondents

Of the 28 possible respondents, 3 responses were provided. 1 respondent (4%) indicated that they expect the size of their facility expansion will be 20,000 square feet or greater. While 2 reported (7%) their expansion would be between 5,000 and 9,999 square feet.

Figure 67: Size of facility expansion

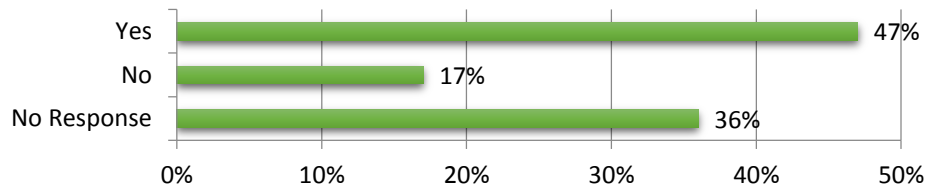


Note: 28 respondents

Facility Upgrades

47% of businesses (22 businesses) indicated that there had been recent facility upgrades. Of those 22 businesses, 23% indicated that those upgrades were completed in the last 12 months.

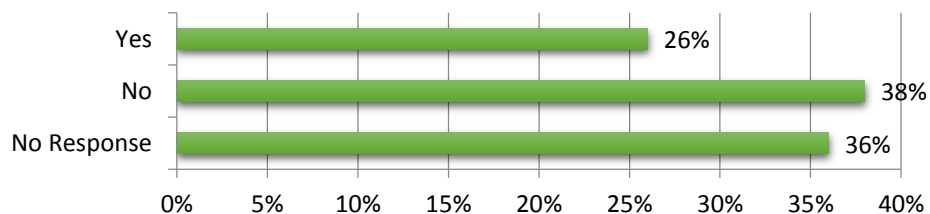
Figure 68: Recent facility upgrades



Note: 47 respondents

26% (12 businesses) indicated that they are planning facility upgrades, and that the majority (33% or 4 businesses) of those planning upgrades will occur in the next 12 months. Respondents were also asked to identify any barrier to upgrading, only 1 respondent provided a response to indicate that they are waiting for a new facility.

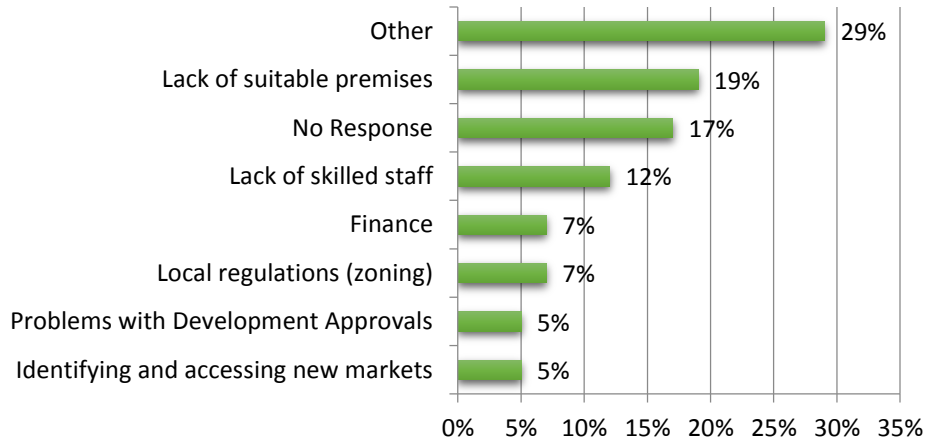
Figure 69: Planning facility upgrades



Note: 47 respondents

Respondents cited a variety of factors that act as barriers to their expansion. Most common of those were lack of suitable premises (19% or 12 businesses), and a lack of skilled staff (12% or 5 businesses). Other responses are listed in Appendix A.

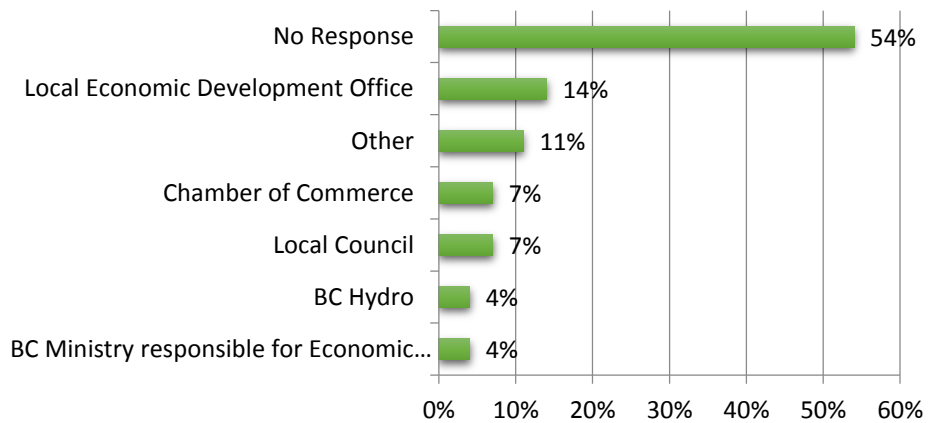
Figure 70: Barriers to expansion



Note: 28 respondents

25% of respondents (5 of 20 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, the highest number (14% or 4 businesses) had approached the local economic development office, 7% (2 businesses) had approached the local Chamber of Commerce, and 7% (2 businesses) had approached the local Council.

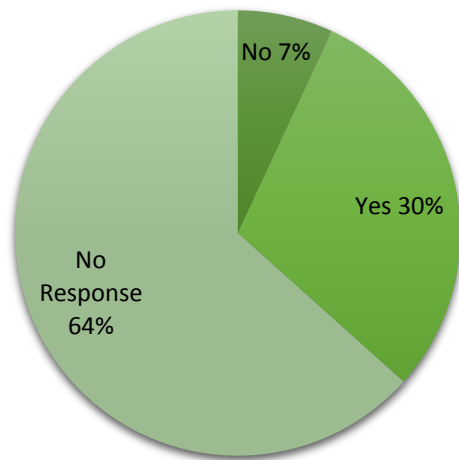
Figure 71: Organizations approached for expansion assistance



Note: 20 respondents

Energy Efficiency

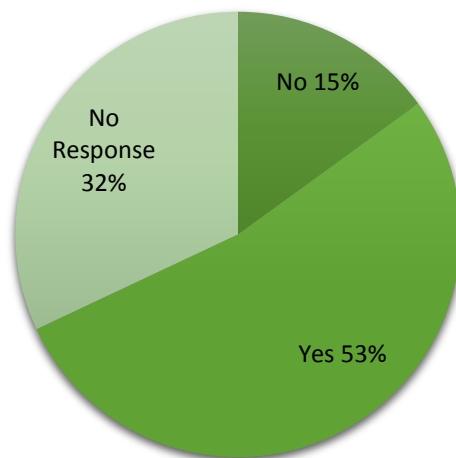
Figure 72: Considering energy efficiency in expansion plans



30% of those who responded (13 businesses) are considering energy efficiency in their expansion plans.

Note: 44 respondents

Figure 73: Awareness of BC Hydro Power Smart



53% of respondents (25 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

Note: 47 respondents

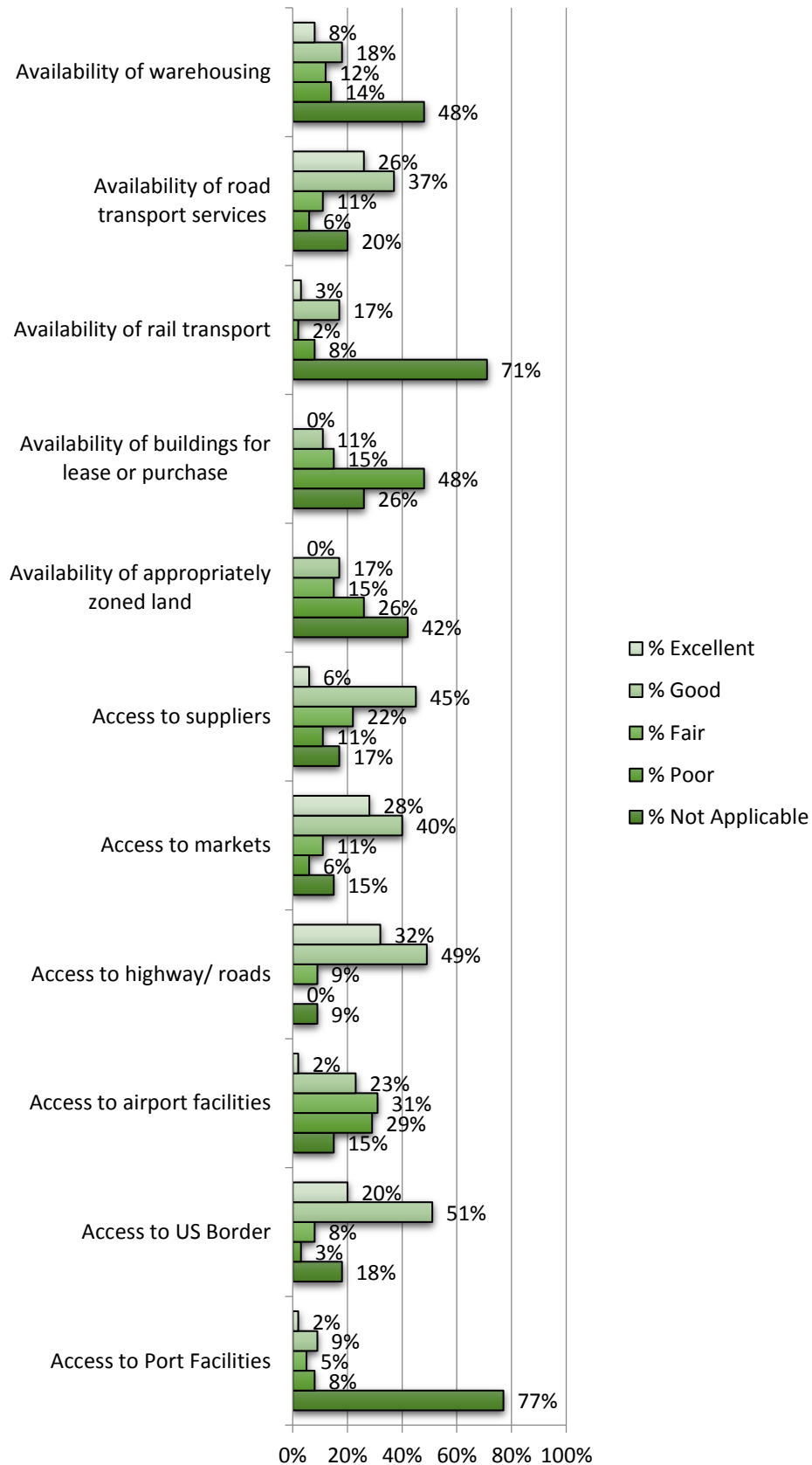
GOVERNMENT SERVICES

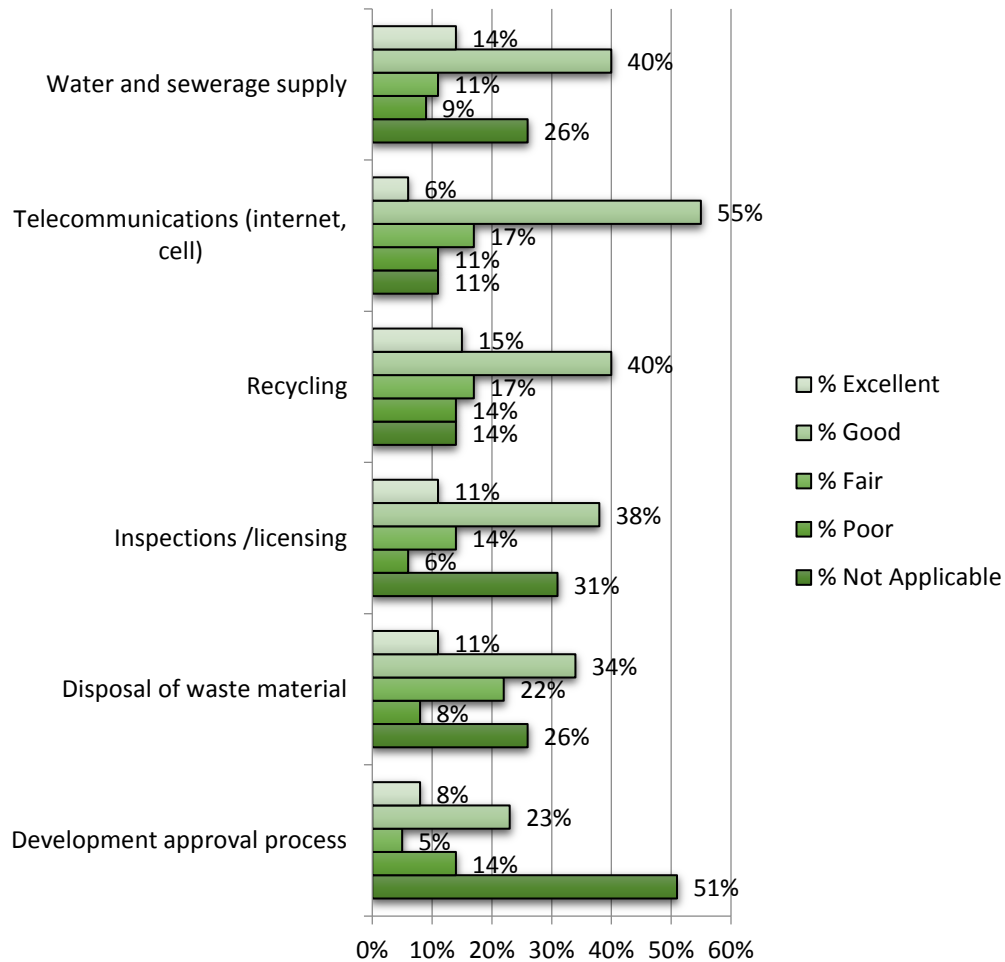
Respondents were asked to rate a list of government services as poor, fair, good or excellent. Respondents also had the option to rate a service as not applicable to their business.

- The services that received the highest number of **POOR** ratings were availability of buildings for lease or purchase (48% or 31 businesses), access to airport facilities (29% or 19 businesses), and availability of appropriately zoned land (26% or 17 businesses).

- The services that received the highest number of **FAIR** ratings were access to airport facilities (31% or 20 businesses), disposal of waste material (22% or 14 businesses), and access to suppliers (22% or 14 businesses).
- The services that received the highest number of **GOOD** ratings were telecommunications (55% or 36 businesses), access to the US border (51% or 33 businesses) and access to highways/roadways (49% or 32 businesses).
- The services that received the highest number of **EXCELLENT** ratings were access to highways/roads (32% or 21 businesses), access to markets (28% or 18 businesses) and availability of road transport services (26% or 17 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were access to port facilities (77% or 50 businesses), availability of rail transport (71% or 46 businesses) and the developmental approval process (51% or 33 businesses).

Figure 74: Rating of government services





Note: 65 respondents

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 55% respondents (26 businesses) indicated they had suggestions. The highest number of responses (36% or 9 businesses) discussed improvements to make commercial and industrial land available for development. Improvements to the development approval process were also referenced by 20% (5 businesses) of respondents. Improvements to curbside recycling opportunities was referenced by 16% of respondents (4 businesses).

The following excerpts illustrate the sentiment towards increasing development opportunities in Sparwood:

“The district needs to accumulate more land and make it more accessible to set up a business.”

“Dire need to develop more industrial land for development.”

“Additional development of industrial land would be positive.”

"Increase awareness on the various developments and services available for businesses."

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



"Need a community liaison officer to communicate with local businesses."

"We work alongside the District to try and get land moving, there are some real challenges to progress with the main one being the simple economics."

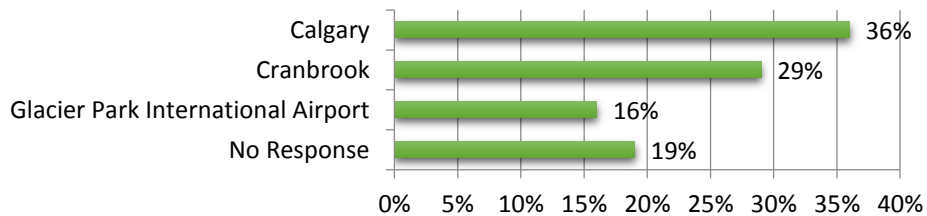
"There should be a curbside recycling program."

"There should be more promotion of commercial buildings that are available."

Airport Service

The Calgary International Airport is the most used airport, with 36% of respondents (25 businesses) indicating they use that airport. The Canadian Rockies International Airport (Cranbrook) was second most used with 29% (20 businesses), and the Glacier Park International Airport being used by 16% of respondents (11 businesses).

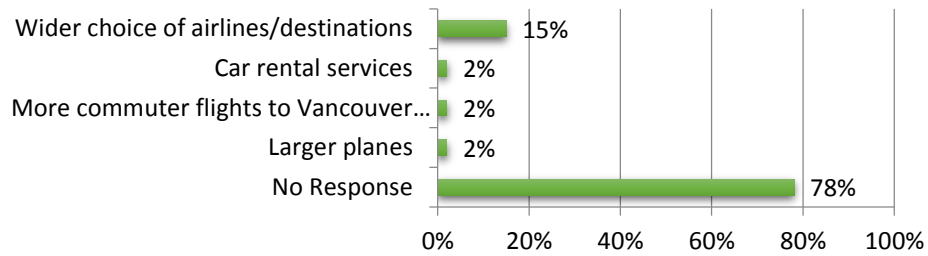
Figure 76: Airport service used



Note: 47 respondents

Respondents indicated that they would most like to see a wider choice of airlines and destinations (15% or 7 businesses), with 2% of respondents (1 business) each indicating a desire for larger planes, more commuter flights to Vancouver and Kelowna, and car rental services.

Figure 77: New services at local airport (Canadian Rockies International Airport)



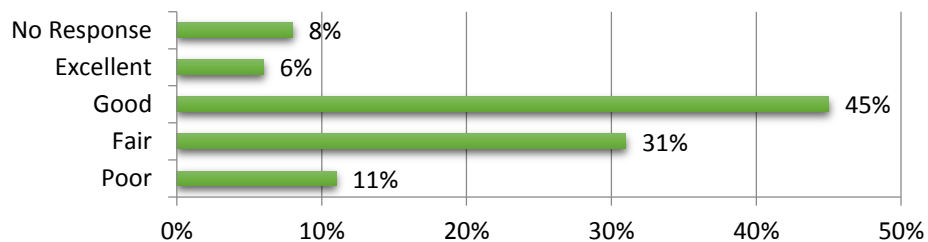
Note: 47 respondents

BUSINESS CLIMATE

Quality of Business Climate

The majority of responses rated the overall business climate as good (45% or 29 businesses).

Figure 78: Rating of local business climate

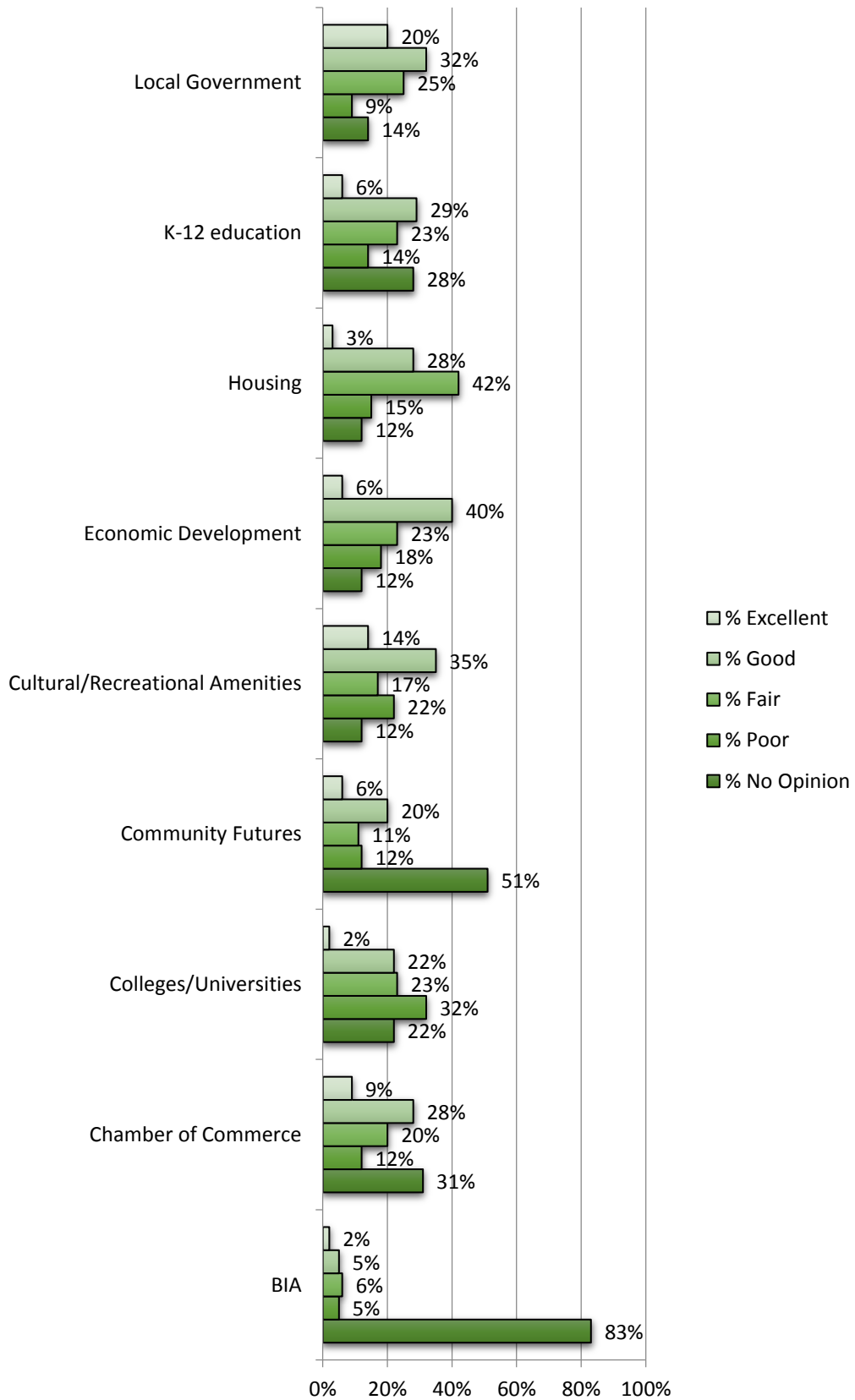


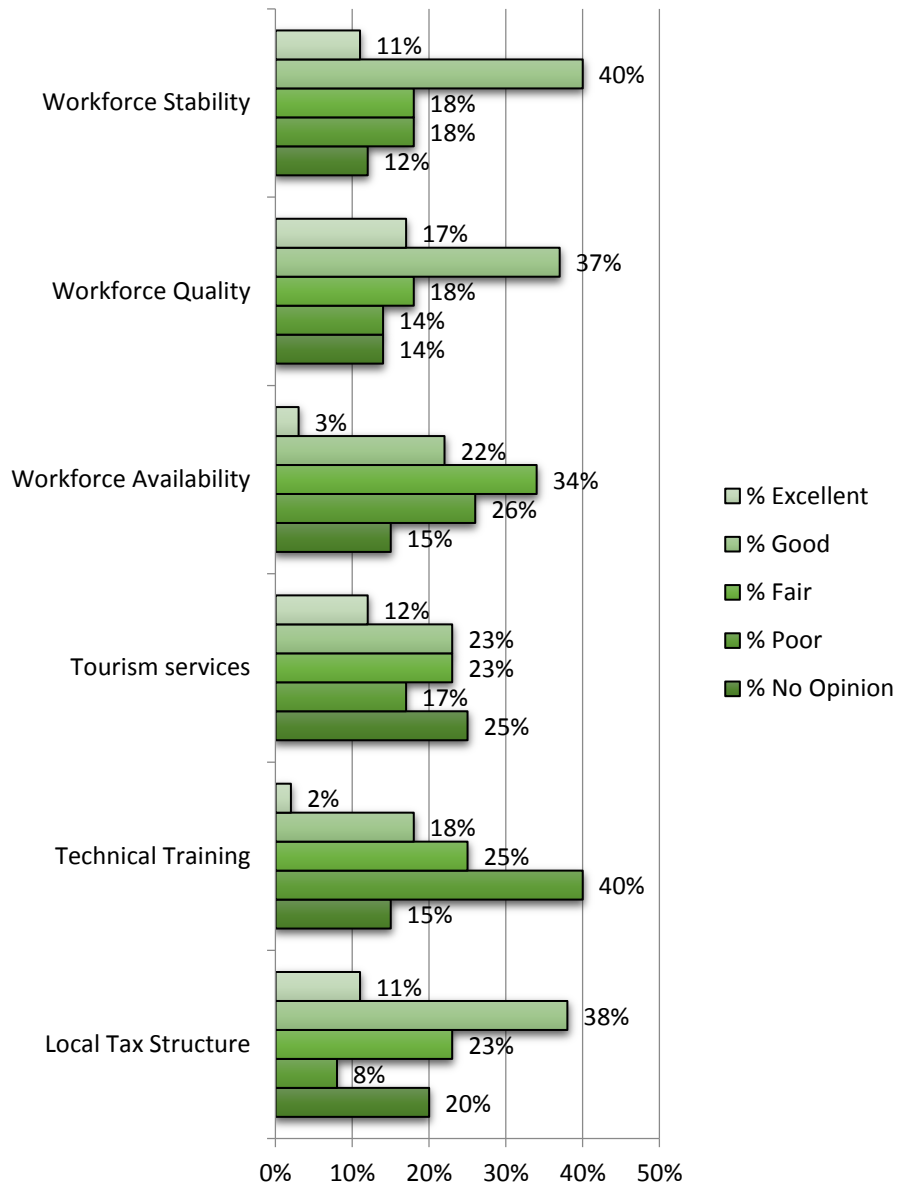
Note: 65 respondents

65 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 (40% / 26 businesses) and colleges/universities (32% or 21 businesses).
- The factors that received the highest number of **FAIR** ratings included housing (42% or 27 businesses) and the workforce availability (34% or 22 businesses).
- The factors that received the highest number of **GOOD** ratings included workforce stability (40% or 26 businesses) and economic development (40% or 26 businesses)
- The factors that received the highest number of **EXCELLENT** ratings included local government (20% or 13 businesses) and workforce quality (17% or 11 businesses).
- The factors that received the highest number of **NO OPINION** ratings include the Business Improvement Association (BIA) (83% or 54 businesses, and Community Futures (51% or 33 businesses).

Figure 79: Rating of business climate factors

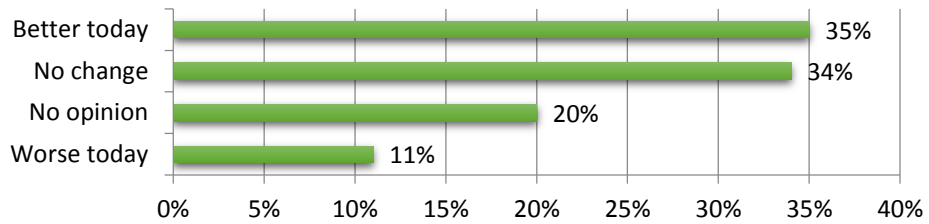




Note: 65 respondents

35% of respondents (23 businesses) felt that the business climate is better today than it was 5 years ago. 11% (7 businesses) thought that it is worse, and 34% (22 businesses) believed there was no change in the business climate.

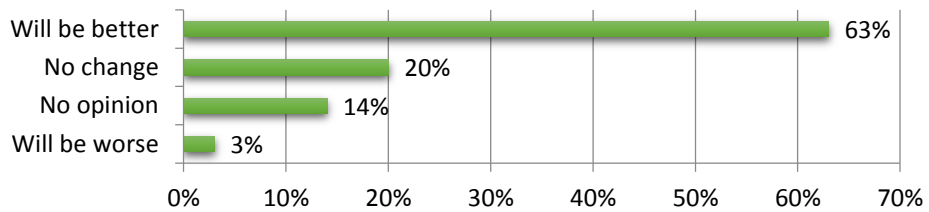
Figure 80: Business climate today vs. 5 years ago



Note: 65 respondents

63% of respondents (41 businesses) expect that the business climate will be better 5 years from today. 3% (2 businesses) expect that it will be worse.

Figure 81: Business climate 5 years from today

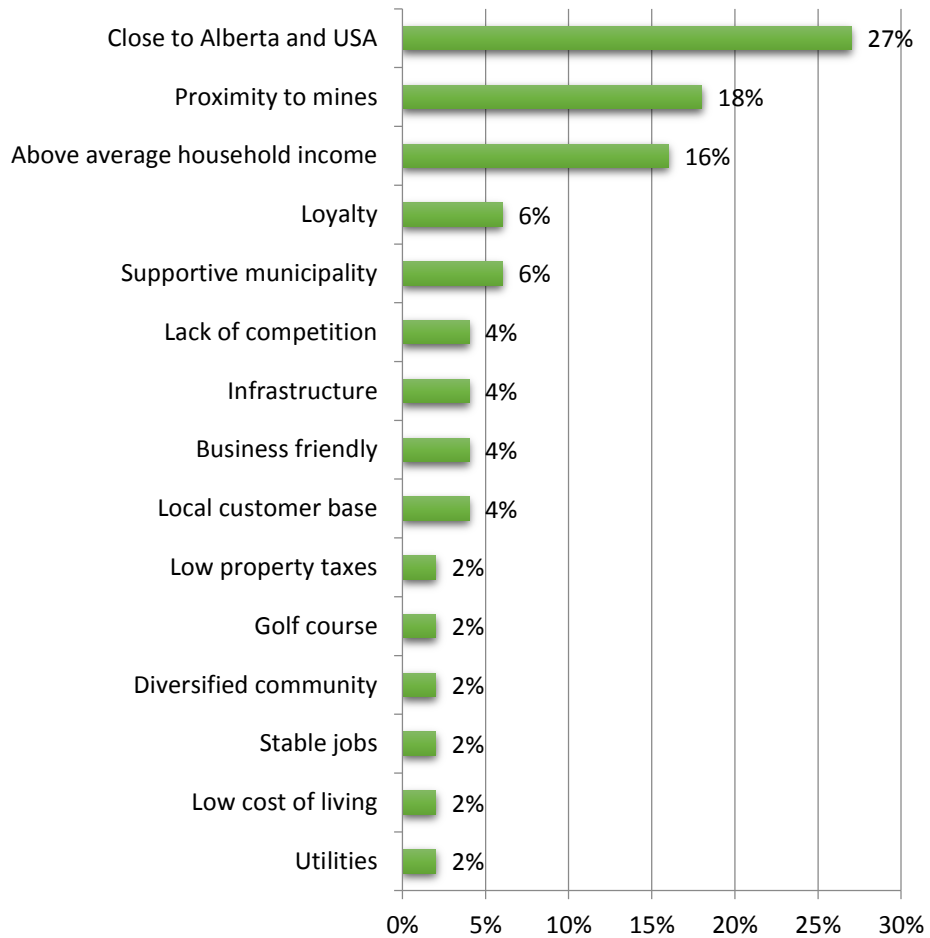


Note: 65 respondents

Strengths and Weaknesses of Business Climate

51 responses were provided when 65 respondents were asked to list the community's strengths as a place to do business, the highest number of responses (27% or 14 responses) cited the area's proximity to Alberta and the United States as the community's strength. 18% (9 businesses) indicated the proximity to mines, and 16% (8 businesses) indicated the above average household income were factors in the community's strength as a place to do business.

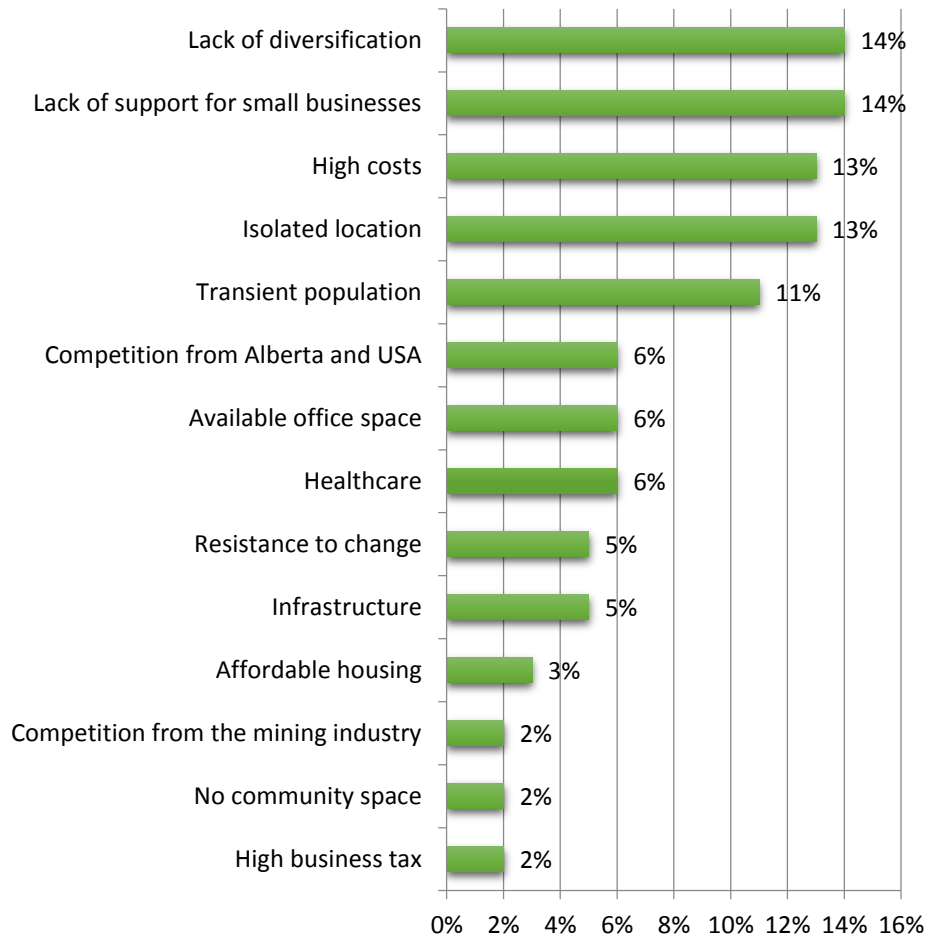
Figure 82: Community's strengths as a place to do business



Note: 65 respondents

64 responses were provided when respondents were asked to list the community's weaknesses as a place to do business, the highest number of responses (14% or 9 respondents) was received for the lack of diversification and the lack of support for small businesses. High costs and the isolated location accounted for 13% of responses (8 businesses).

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

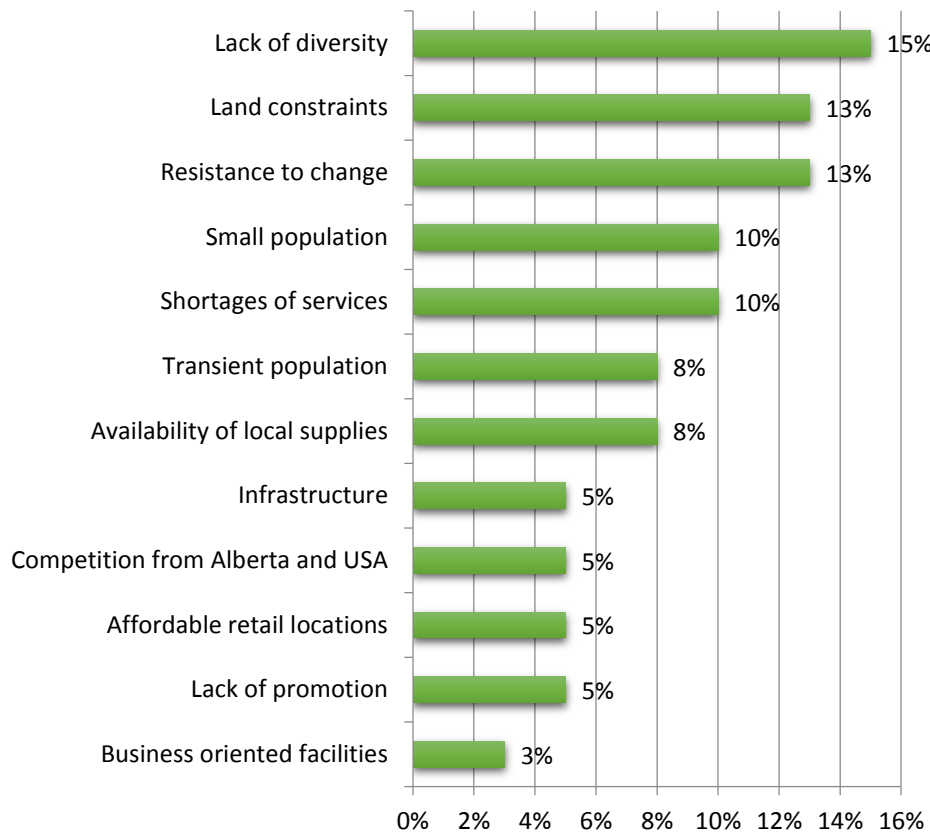


Note: 65 respondents

Business Growth

72% of respondents (34 businesses) indicated that there are barriers to growth. The highest number of respondents (15% or 6 businesses) stated that lack of diversity is an important barrier to growing the community's economy. Other commonly cited barriers include land constraints and resistance to change (13% or 5 businesses).

Figure 84: Barriers to growth in the community



Note: 47 respondents

The following excerpts illustrate the barriers cited:

“Tourism is somewhat hampered by coal mining. Community is too focused on the mine.”

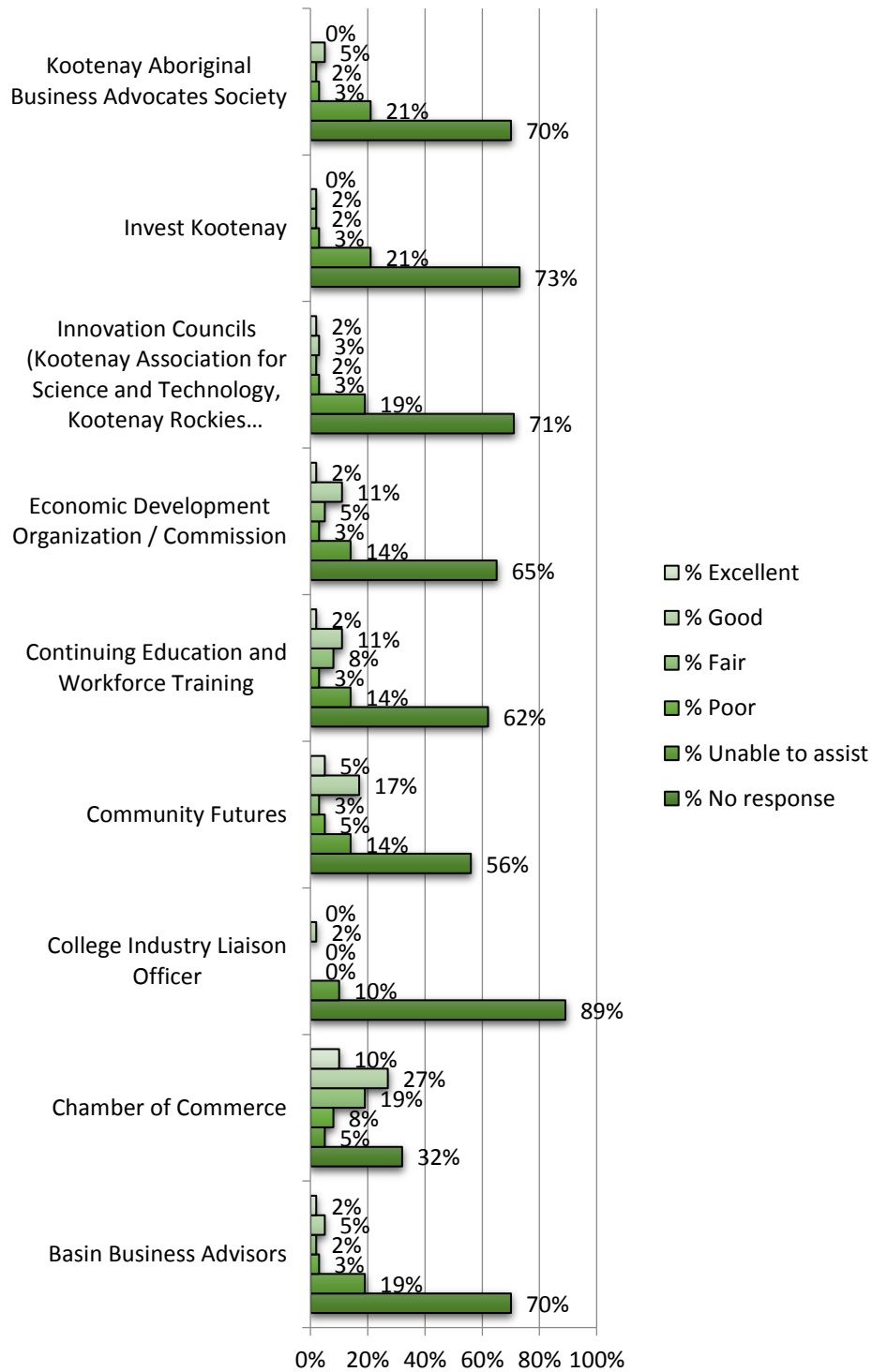
“Land constraints, lack of parking. New development areas near the highway mean traffic may not come.”

“Not enough supplies are readily available. Simple things like glue sticks, material, thread but also lots of other things are not easy to get locally.”

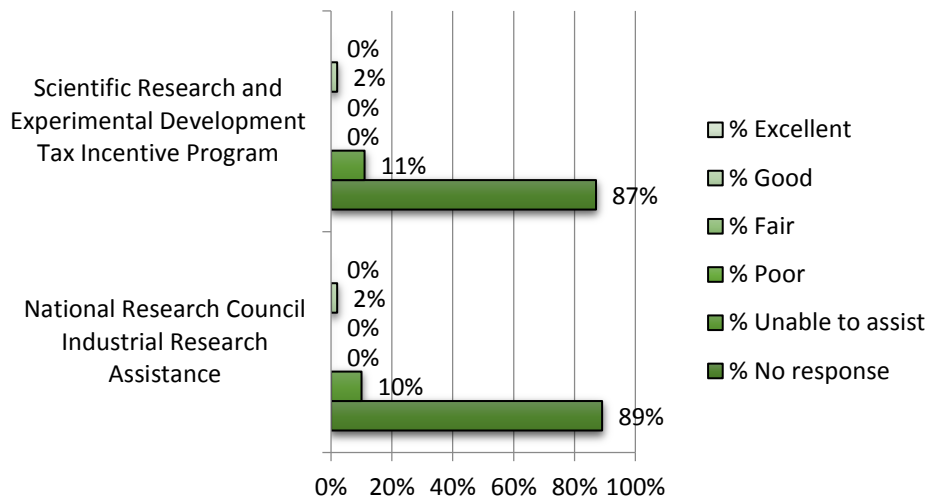
“The mine means that currently there is no diversity which is needed.”

Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest Poor response (8% or 5 businesses), as well as the highest Excellent response (10% or 6 businesses), high responses were also received for Good (27% or 17 businesses) and Fair (19% or 12 businesses). Respondents found the Basin Business Advisors (19% or 12 businesses), Innovation Councils (19% or 12 businesses), Invest Kootenay (21% or 13 businesses) and the Kootenay Aboriginal Business Advocates Society (21% or 13 businesses) most commonly unable to assist.

Figure 85: Level of service from business support providers



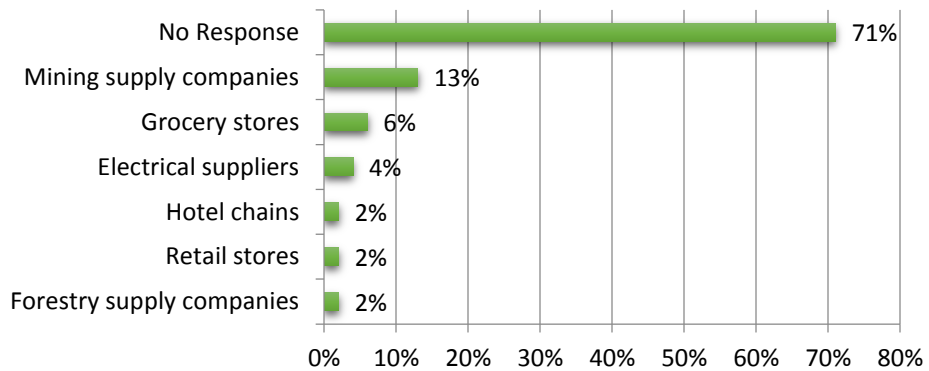
Note: 63 respondents



Note: 63 respondents

32% of respondents indicated that there are suppliers that could locate in the region. Mining supply companies was most commonly cited by 13% of respondents (6 businesses), with grocery stores being mentioned by 6% (3 businesses).

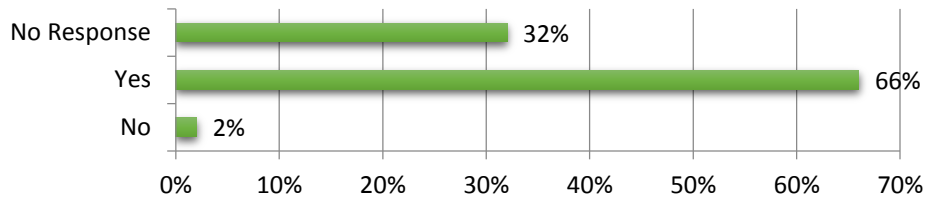
Figure 86: Potential Suppliers



Note: 47 respondents

66% of respondents (31 businesses) indicated that they do supply products or services to companies located in the community or region.

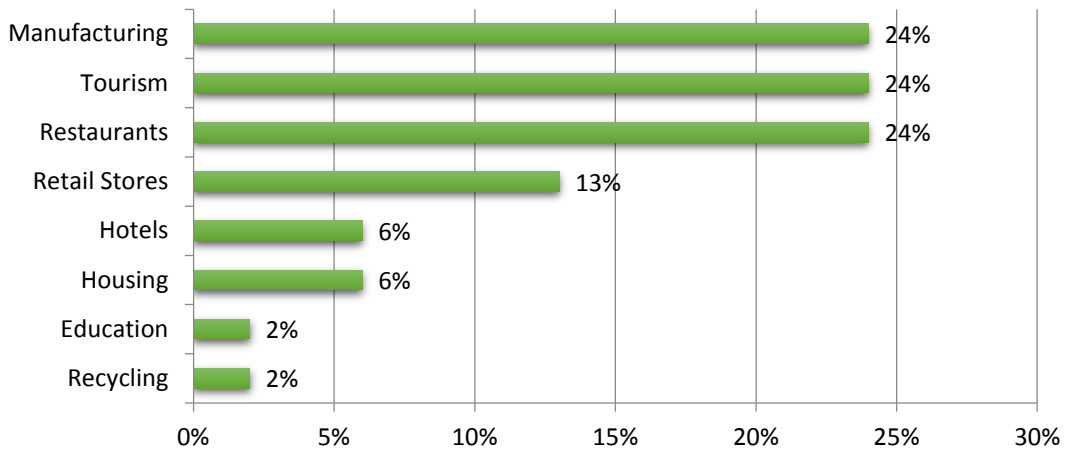
Figure 87: Supply to local companies



Note: 47 respondents

71% of respondents indicated that there are sectors, businesses or industries that could be attracted to the region. Manufacturing, Restaurants and Tourism were the most frequently cited (24% or 13 respondents) businesses/sectors identified as important to attract. Retail Stores was referenced by 13% of respondents (7 businesses).

Figure 88: Sectors, businesses or industries that could be attracted to region

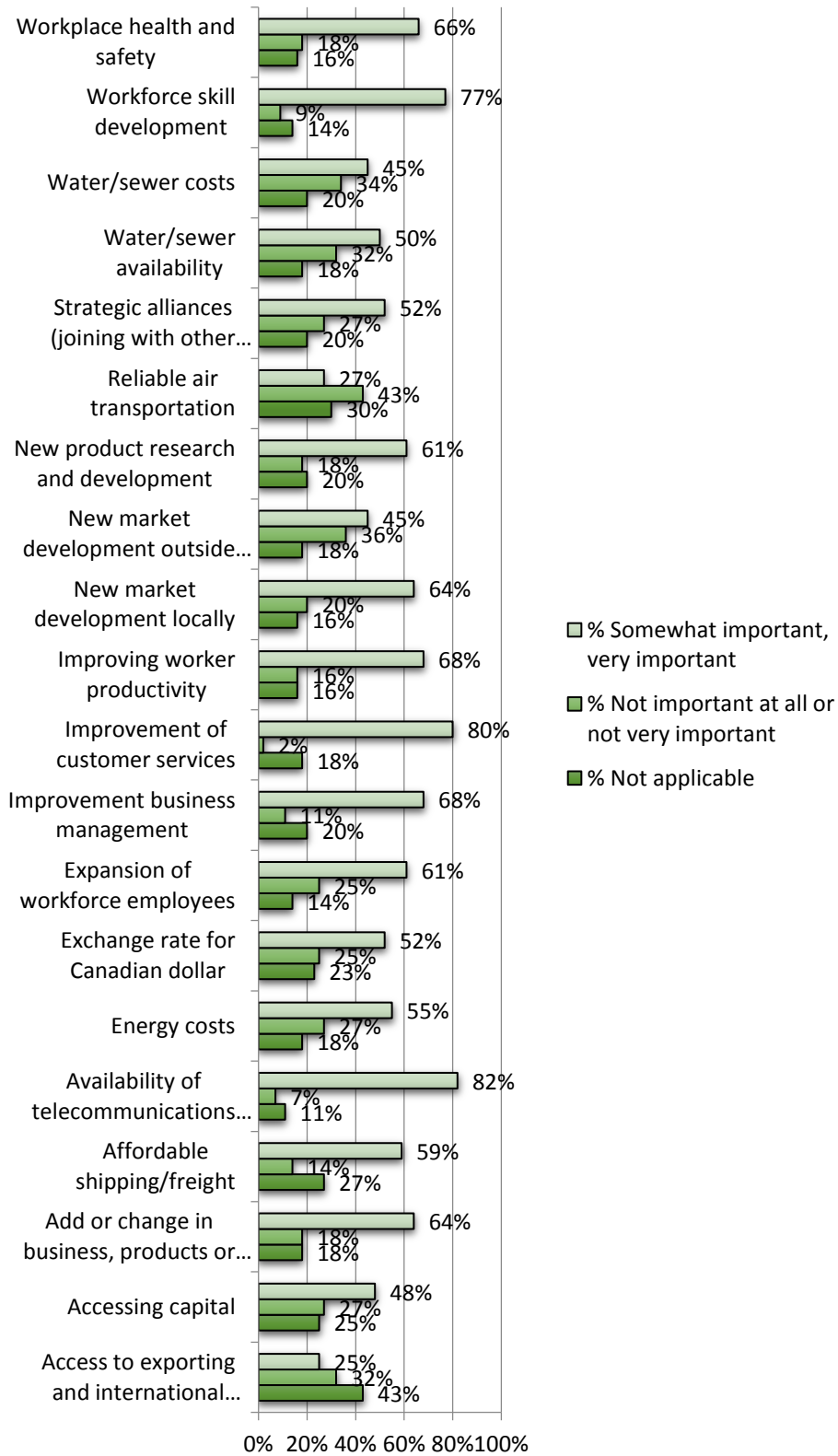


Note: 65 respondents

Business Competitiveness and Productivity

Businesses were asked to consider the importance of various factors for ensuring business competitiveness over the next five years. Those factors that received the highest number of somewhat important or very important ratings include availability of telecommunications infrastructure and services (82% or 36 businesses), improvement of customer service (80% or 35 businesses) and workforce skill development (76% or 34 businesses).

Figure 89: Importance of business competitiveness factors

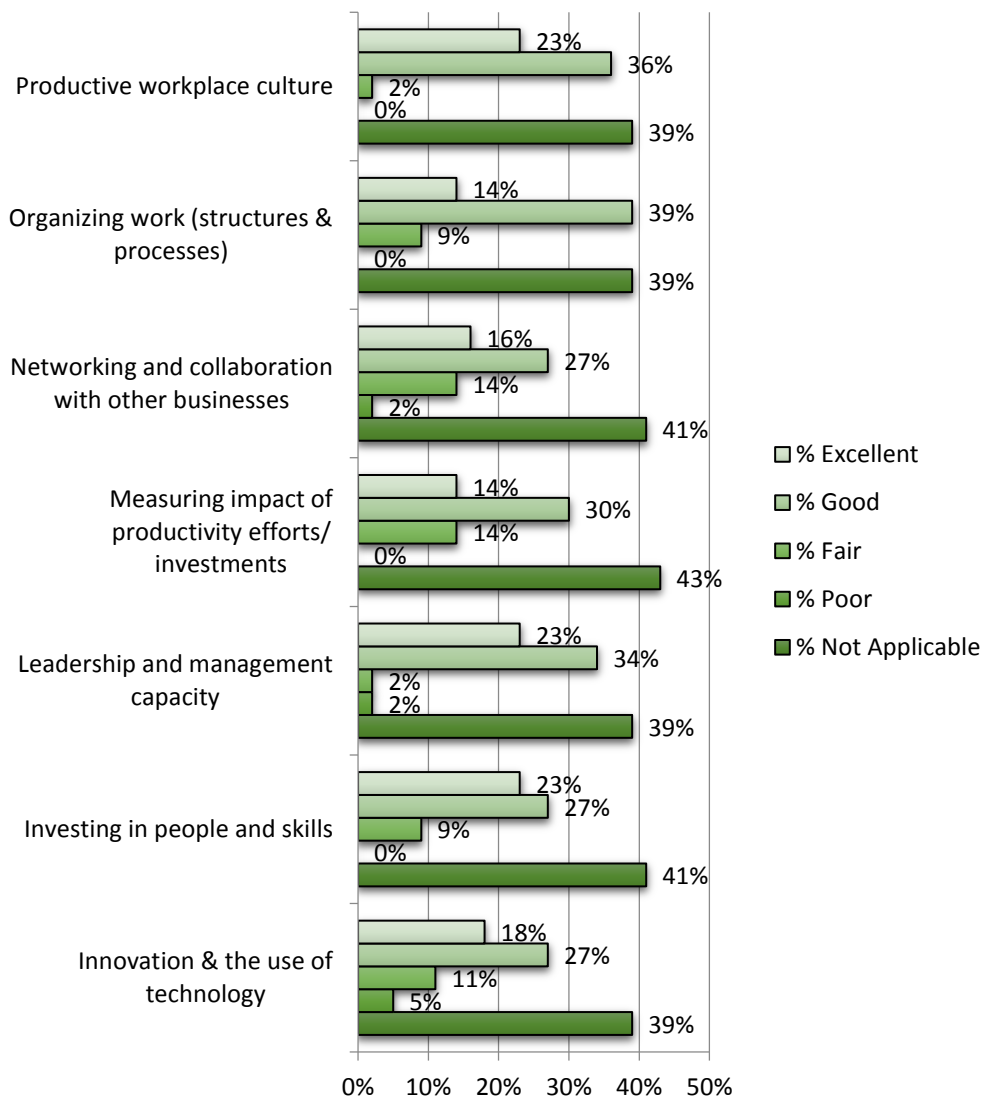


Note: 44 respondents

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

- **EXCELLENT** ratings include investing in people and skills, leadership and management capacity, and productive workplace culture (23% or 10 businesses);
- **GOOD** ratings include organizing work (structures and process (39% or 17 organizing work (structures and processes) (27% or 17 businesses) and productive workplace culture (36% or 16 businesses);
- **FAIR** ratings include measuring impact of productivity efforts/investments and networking and collaboration with other businesses (14% or 6 businesses)
- **POOR** ratings include innovation and the use of technology (5% or 2 businesses).

Figure 90: Performance on key productivity drivers

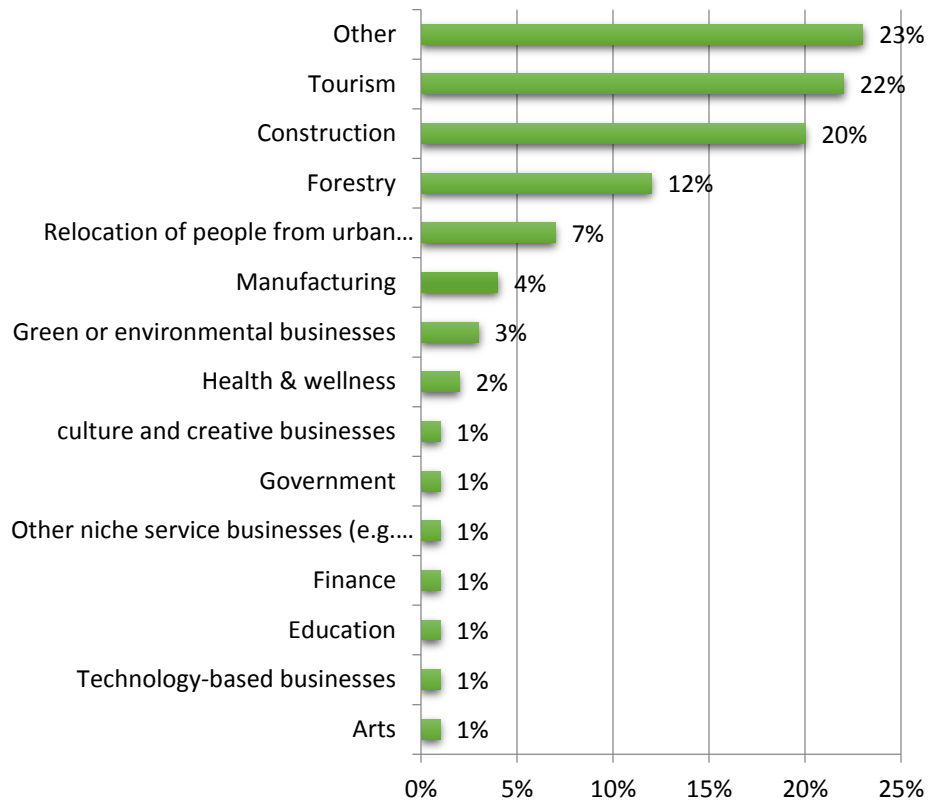


Note: 44 respondents

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (22% or 34 businesses), construction (20% or 31 businesses), and forestry (12% or 19 businesses). For a list of drivers identified as “Other”, refer to Appendix A.

Figure 91: Economic drivers with greatest growth potential

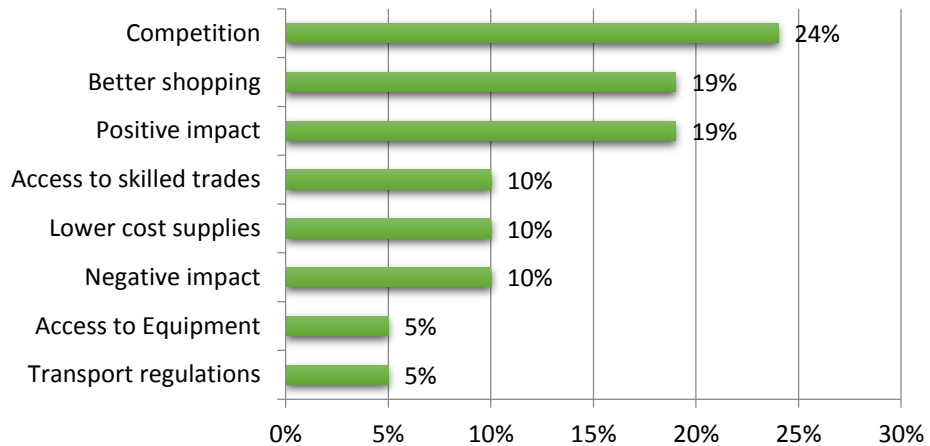


Note: 63 respondents

Proximity to Alberta

19 respondents (43%) reported that they were impacted by their proximity to Alberta. Competition was an impact for 24% respondents (5 businesses), while 19% (4 businesses) indicated impacts were positive and included better shopping.

Figure 92: Impact of Proximity to Alberta



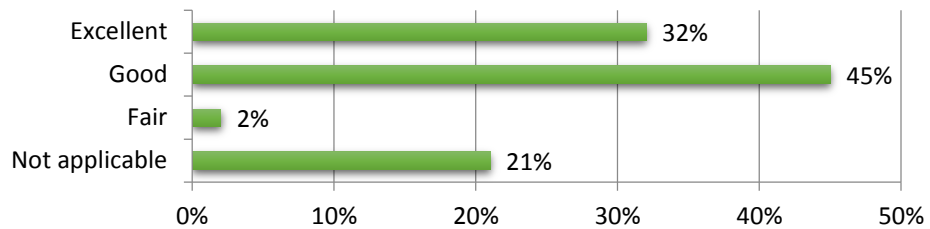
Note: 19 respondents

ASSESSMENT AND PLANS

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (45% or 21 businesses), 32% (15 businesses) reported that their company's health is excellent and 2% (1 business) reported that it is fair. It is worth noting that no respondents indicated that their company is in poor health.

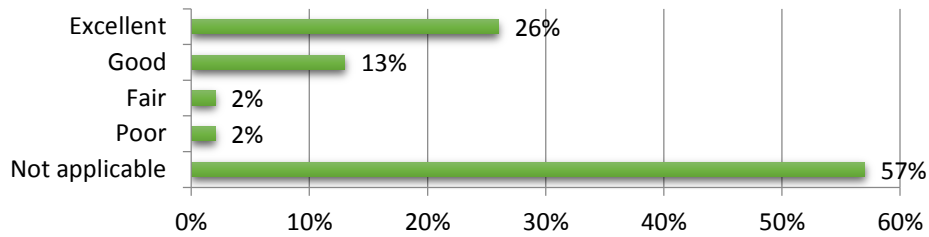
Figure 93: Facility's overall health



Note: 47 respondents

Most businesses with a parent company indicated that the health of that parent company is either excellent (26% or 12 businesses) or good (13% or 6 businesses).

Figure 94: Overall health of parent company

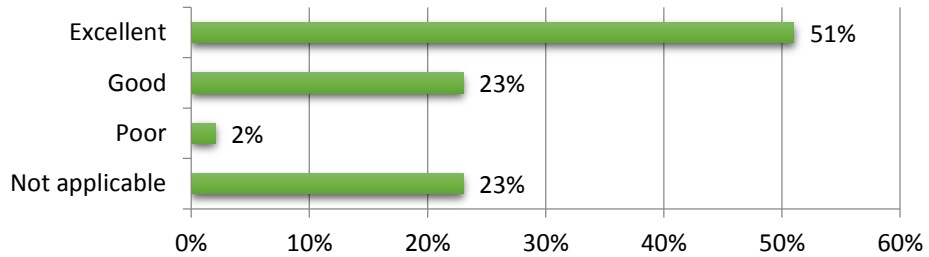


Note: 47 respondents

Attitude toward Community

51% of respondents (24 businesses) indicated that their local management’s attitude toward the community is excellent and 23% (11 businesses) indicated that it is good.

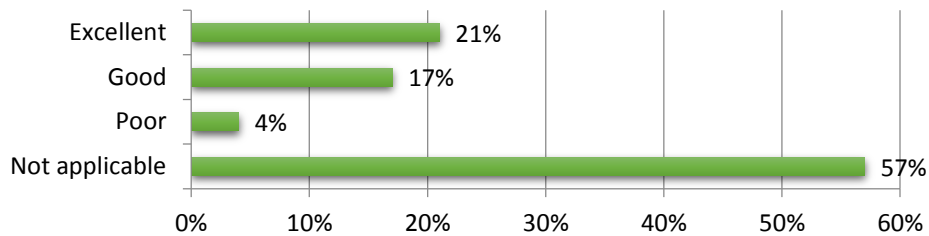
Figure 95: Local management's attitude toward community



Note: 47 respondents

The highest number of respondents (21% or 10 businesses) indicated that their parent company’s attitude toward the local community is excellent.

Figure 96: Parent company's attitude toward local community

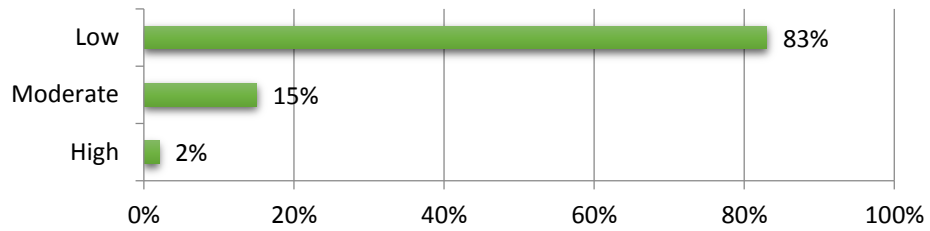


Note: 47 respondents

Risk of Closing or Downsizing

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

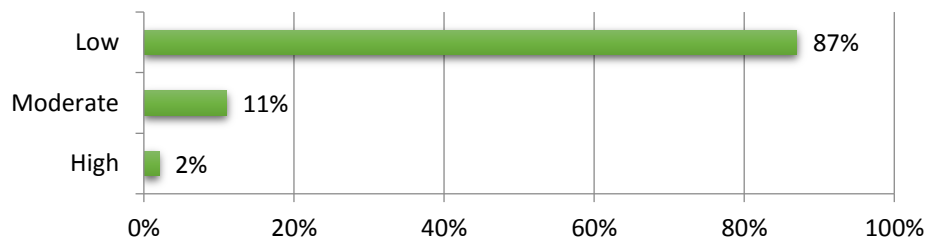
Figure 97: Risk of facility closing



Note: 65 respondents

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

Figure 98: Risk of facility downsizing



Note: 65 respondents

RECOMMENDATIONS

NEXT STEPS

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

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

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

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

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

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

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

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

POTENTIAL ACTION AREAS

Local Workforce

The District of Sparwood has a population of 3,927⁹, and the businesses interviewed report a total of 2,140 employees¹⁰. The vast majority (80%) of employees are full-time. The employment rate reported for the Rockies region by BC Stats is 65%¹¹, and the information provided as part of this survey indicates a minimum rate of 54%. Given that the employee numbers do not reflect the total number of employees, there may be an indication that a number of employees are travelling from outside of Sparwood to work within the District. Actions related to this theme include exploring ways in which those employees can be engaged with the community. Related, are the critical considerations for employees identified which include housing, cost of living and childcare. There may be actions available at the local level to address these areas of concern and also engage employees who currently reside out of town. Additional research may be warranted to understand how many employees live outside of Sparwood and what opportunities may exist to increase residency within the District if warranted.

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 49% of businesses report having.

Business Growth & Expansion

45% of businesses in the region report being a growth cycle, and 43% indicate that they are planning to expand within the next three years. Close to half of those businesses planning to expand do not feel their existing site is adequate, yet the majority of expansion plans are expected to occur within the community. Businesses also report that employment rates are stable, and that they anticipate an increase to the amount of full-time employment. This data coupled with the general positive business climate and the optimism for the future provides a positive report on local business growth. Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of assistance with navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. It is worth noting that very few businesses sought assistance with

⁹ Source: BC Stats (2013). Population Estimates: Municipalities, Regional Districts and Development Regions 2011 - 2014

¹⁰ Note: 2,140 is not the total number of employees/jobs in Sparwood, but the number of employees reported by businesses surveyed as part of this research. The actual number of employees is likely greater.

¹¹ Source: BC Stats (2015). Socio-Economic Profile – College Region 5 - Rockies.

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

These potential actions and any others, should be designed to address the stated barriers to expansion which include lack of suitable premises and lack of skilled staff. The lack of appropriately zoned land in Sparwood was also a finding in the Employment Lands Final Report (2014) prepared by the RDI, that found that there are indeed very few vacant commercial and industrial parcels available.

Economic Diversification

A lack of diversification was cited most frequently by local businesses as one of Sparwood's greatest weaknesses and its greatest barrier to growth, this is evidenced by the fact that the largest percentage of respondents indicated that between 76 – 100% of their sales are generated by their top three customers. This theme is echoed in the work that Sparwood is undertaking as part of its Official Community Plan update and recent Revitalization Tax Incentive Program. Businesses identified manufacturing, restaurants and tourism as the most important sectors to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, construction and forestry. Specific reference to attracting a grocery store was also made. Diversifying the economy will increase the resilience of the District in the face of any future changes in the mining sector. Actions to increase the diversification could include working with local businesses to expand their customer base and increase small business support programs from groups such as Community Futures East Kootenay. Working with other municipalities and the Regional District on an Economic Strategy may also be considered. Continued collaboration between government and local businesses towards a diversified economy will be key to achieving results in this area. With most businesses indicating an overall good business climate, there is much positive support to build on the work already occurring in this area.

Supply Sourcing and Procurement

The data indicates that the majority of supplies come from outside the local region, and only 17% of supplies are sourced locally. The most common response (44%) 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 area businesses to understand what opportunities may exist to increase local supply, and actively engage existing businesses or encourage new businesses to fill that role if feasible. A stakeholder round table discussion could be a way to begin the conversation to increase supply options locally. A potential related impact could be the diversification of the local economy.

Local businesses do not appear to engage with government procurement processes, with only 10% of businesses indicated that they have. A significant number of non-responses (68%) suggest there may be a lack of awareness of the opportunities available through government procurement. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

A lack of technical training and colleges/universities were cited as factors contributing towards a poor business climate. Businesses identified a need for training in the areas of emerging technologies, skilled trades and health and safety. Improving technical training and workforce skill development is important for business competitiveness. Findings indicate that the majority of businesses do have a training budget, and that they have a preference for individual coaching sessions (29%), online webinars (27%), or classroom (21%) style formats. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses, yet only 28% of respondents indicated that they have a formal succession plan and just under half have an up-to-date business plan. Furthermore, business and management training was among the top cited areas of training needs. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, 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.

Government Services

There is a prevalent perception among respondents that there is a lack of buildings and land available for lease or purchase.

With a large number of businesses planning expansions contingent on finding new space, there is an opportunity for the local government to work with local businesses to understand existing and future business needs and assess land use planning at a micro level.

Improved communication and marketing of District-owned lands could help address this issue of a perceived lack of available land. Currently there is approximately 60 acres of industrial land available for development within the District of Sparwood. However, the absence of a land development industry—excepting that which the municipality has brought to the market—has kept these lands from being made available. There is also a lack of available serviced land and high demand for existing buildings within the community. This has changed slightly since the economic downturn and the reduced price of coal during late 2014 and early 2015 with a number of business closures.

APPENDIX A: DATA TABLES

COMPANY INFORMATION

Figure 1: Industry Classification	NAICS Code	Count	Percent
Agriculture, forestry, fishing and hunting	11	1	2%
Arts, Entertainment and Recreation	71	1	2%
Educational Services	61	1	2%
Mining, quarrying, and oil and gas extraction	21	2	3%
Information and Cultural Industries	51	2	3%
Finance and Insurance	52	3	5%
Health Care and Social Assistance	62	3	5%
Transportation and Warehousing	48-49	3	5%
Manufacturing	31-33	3	5%
Wholesale Trade	41	3	5%
Real Estate and Rental and Leasing	53	4	6%
Accommodation and Food Services	72	4	6%
Other Services	81	8	12%
Retail Trade	44-45	9	14%
Professional, Scientific and Technical Services	54	9	14%
Construction	23	9	14%
Total		65	100%

Survey Respondents: 65

Figure 2: Facility function(s)	Count	Percent
Manufacturing	2	3%
Headquarters	6	8%
Engineering/RD	6	8%
Warehousing	9	12%
Distribution	16	22%
Services	35	47%
Total	74	100%

Survey Respondents: 47

Figure 3: Location of primary competitors	Count	Percent
National	1	1%

International	4	5%
Elsewhere in BC	5	7%
Alberta	8	11%
Local / regional	55	75%
Total	73	100%

Survey Respondents: 47

Figure 4: Factors that make them successful in this region (key words)	Count	Percent
Dependability	1	2%
Innovation	1	2%
Unique Products	1	2%
Reliability	1	2%
Unique Service	2	4%
Experience	2	4%
Business Relationships	2	4%
Workforce	3	6%
Expertise	3	6%
High Quality Products	4	8%
Limited Competition	5	10%
Strong Community	6	12%
Service	10	19%
Location	11	21%
Total	52	100%

Survey Respondents: 47

Figure 5: Why did you choose this community to locate your business?	Count	Percent
Hobby turned into a business	1	2%
Availability of land	1	2%
Growing industry	2	4%
Sparwood is home	2	4%
Location	3	6%
Community	3	6%
No response	10	20%
Proximity to mines	11	22%
Market opportunity	17	34%
Total	50	100%

Survey Respondents: 47

Figure 6: Other location (Yes/No)	Count	Percent
No Response	8	17%
No	13	28%
Yes	26	55%
Total	47	100%

Survey Respondents: 47.0

Figure 7: Does this company have another location elsewhere?: If Yes, where?	Count	Percent
Outside Canada	7	17%
Elsewhere in nation	13	31%
In Province	22	52%
Total	42	100%

Respondents with another location: 26

Figure 8: Location of headquarters	Count	Percent
Outside Canada	3	6%
Elsewhere in nation	12	26%
In Province	13	28%
No Response	19	40%
Total	47	100%

Survey Respondents: 47

Figure 9: Life cycle stage	Count	Percent
Declining	0	0
Emerging	1	2%
Maturing	17	36%
Growing	21	45%
No Response	8	17%
Total	47	100%

Survey Respondents: 47

Figure 10: Length of time in business	Count	Percent
10-19 years	5	8%
less than 1 year	5	8%
5-9 years	12	18%
1-4 years	15	23%
more than 20 years	28	43%
Total	65	100%

Survey Respondents: 65

Figure 11: Type of business	Count	Percent
Limited Liability Partnership	1	2%
Non-Profit	2	3%
Other	2	3%
No Response	3	5%
Partnership	3	5%
Sole Proprietorship	12	18%
Corporation	42	65%
Total	65	100%

Survey Respondents: 65

Figure 12: Ownership and management changes in last 5 years	Count	Percent
No Response	8	17%
Yes	16	34%
No	23	49%
Total	47	100%

Survey Respondents: 47

Figure 12b: Impact of Ownership or Management Change	Count	Percent
No Response	1	6%
Neutral	6	38%
Positive	9	56%
Total	16	100%

Respondents that had an ownership change: 16

Figure 12c: Pending ownership change	Count	Percent
Yes	6	9%
No Response	9	14%
No	50	77%
Total	65	100%

Survey Respondents: 65

Figure 13: Anticipated timeline for ownership change	Count	Percent
3 years or more	2	33%

No Response	2	33%
1 year or less	2	33%
Total	6	100%

Those anticipating ownership change: 6.0

Figure 14: Anticipated exit strategy	Count	Percent
Sell/transfer to a family member	1	17%
Sell/transfer to a non-family member	1	17%
Sell to another company	2	33%
No Response	2	33%
Total	6	100%

Those anticipating ownership change: 6.0

Figure 15b: Successor Identified	Count	Percent
No	1	17%
Yes	2	33%
No Response	3	50%
Total	6	100%

Those anticipating ownership change: 6.0

Figure 15: Is there a formal succession plan?	Count	Percent
Yes	18	28%
No	19	29%
Not applicable	28	43%
Total	65	100%

Figure 15b: If Yes, have you been assisted in preparation of a succession plan?	Count	Percent
No	3	17%
Yes	4	22%
No Response	11	61%
Total	18	100%

Survey Respondents answering Yes to "Is there a formal succession plan?" :
18

Figure 15c: If Yes, by whom	Count	Percent
No Response	1	25%
Accountant	1	25%
Lawyer	2	50%
Total	4	100%

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

plan?" : 4

Figure 15d: If Yes, by whom: If other, please explain	Count	Percent
No Response	4	100%
Total	4	100%

Survey Respondents answering Yes to "Is there a formal succession plan?" : 4

Figure 16: Existence of current business plan	Count	Percent
No Response	7	11%
No	26	40%
Yes	32	49%
Total	65	100%

Survey Respondents: 65

LOCAL WORKFORCE

Figure 17: Total number of employees	Count	Percent
Over 100	2	3%
50-99	5	8%
20-49	9	14%
10-19	20	31%
5-9	0	0%
Less than 5	29	45%
Total	65	100%

Survey Respondents: 65

Total Employees: 2140

Figure 18: Nature of Employment	Count	Percent
Part Time	169	8%
Temporary	259	12%
Full Time	1712	80%
Total	2140	100%

Survey Respondents: 65

Figure 18b: Number of Full-Time Employees	Count	Percent
Over 100	2	3%
50-99	4	6%

20-49	9	14%
10-19	13	20%
Less than 5	37	57%
Total	65	100%

Survey Respondents: 65

Figure 18c: Number of Part-Time Employees	Count	Percent
20-49	2	3%
0 or no answer	5	8%
10-19	6	9%
Less than 5	52	80%
Total	65	100%

Survey Respondents: 65

Figure 18d: Number of Temporary Employees	Count	Percent
Over 100	1	2%
10-19	2	3%
0 or no answer	9	14%
Less than 5	53	82%
Total	65	100%

Survey Respondents: 65

Figure 19: Historical Employment trend	Count	Percent
Decreased	4	6%
Increased	18	28%
No Response	19	29%
Stayed the Same	24	37%
Total	65	100%

Survey Respondents: 65.0

Figure 19b: Projected number of employees in 3 years	Count	Percent
Over 100	3	6%
50-99	7	15%
20-49	7	15%
10-19	15	32%
Less than 5	15	32%
Total	47	100%

Survey Respondents: 47

Figure 20: Full-time employment trend over last 3 years	Count	Percent
Decreased	2	4%
No Response	13	28%
Stayed the same	15	32%
Increased	17	36%
Total	47	100%

Survey Respondents: 47.0

Figure 21: Full-time employment trend over next 3 years	Count	Percent
Stay the Same	6	13%
Will Increase	19	40%
No Response	22	47%
Total	47	100%

Survey Respondents: 47.0

Figure 22: Age of the majority of essential employees	Count	Percent
50 or older	7	15%
35 - 49	17	36%
26 - 34	11	23%
under 25	0	0%
No Response	12	26%
Total	47	100%

Survey Respondents: 47

Figure 23: Wages in relation to other businesses in the region	Count	Percent
Less than	8	17%
Greater than	8	17%
Same	13	28%
No Response	18	38%
Total	47	100%

Survey Respondents: 47

Figure 23b: Average hourly wage: Skilled / Professional	Count	Percent
\$13-\$14	1	2%
\$100 or more	2	3%

\$15-\$19	2	3%
\$10-\$12	2	3%
\$50-\$99	6	9%
\$29-\$20	10	15%
No Response	19	29%
\$49-\$30	23	35%
Total	65	100%

Survey Respondents: 65

Figure 23c: Average hourly wage: Semi-skilled	Count	Percent
\$13-\$14	2	3%
\$10-\$12	4	6%
\$49-\$30	6	9%
\$15-\$19	8	12%
\$29-\$20	16	25%
No Response	29	45%
Total	65	100%

Survey Respondents: 65

Figure 23d: Average hourly wage: Entry- level	Count	Percent
\$49-\$30	1	2%
\$15-\$19	2	3%
\$13-\$14	2	3%
\$10-\$12	6	9%
\$29-\$20	7	11%
No Response	47	72%
Total	65	100%

Survey Respondents: 65

Figure 24: Trend in unfilled positions	Count	Percent
Increasing	5	11%
Decreasing	5	11%
Staying the Same	11	23%
No Response	26	55%
Total	47	100%

Survey Respondents: 47

Figure 25: Location of workforce recruitment	Count	Percent
Provincial	4	6%
National	5	8%

No Response	14	22%
Local	42	65%
Total	65	100%

Survey Respondents: 65

Figure 26: Recruitment and retention challenges	Count	Percent
Retention challenges	17	26%
Recruitment challenges	32	49%

Survey Respondents: 65

Figure 26b: Retention Challenges	Count	Percent
No Response	10	15%
Yes	17	26%
No	38	58%
Total	65	100%

Survey Respondents: 65

Figure 26c: Recruitment Challenges	Count	Percent
No Response	8	12%
No	25	38%
Yes	32	49%
Total	65	100%

Survey Respondents: 65

Figure 27: Employee Retention Efforts	Count	Percent
Profit-Sharing	1	2%
Health & Wellness	1	2%
Pensions	2	4%
Benefits	2	4%
Training	3	7%
Bonuses	4	9%
Flextime	6	13%
No Response	26	58%
Total	45	100%

Survey Respondents: 44

Figure 28: Recruitment Activities	Count	Percent
Job Fairs	1	2%
Training	1	2%

Referrals	1	2%
Recruitment Agency	2	4%
Word of Mouth	2	4%
Newspaper	3	6%
Online Job Board	4	8%
Advertising	7	14%
No Response	30	59%
Total	51	100%

Survey Respondents: 44

Figure 29: Responses to Current Recruitment Challenge Areas	Count	Percent
Hospitality Service	1	2%
CDL Drivers	1	2%
Construction/Contractors	1	2%
Material/Fabricators	1	2%
Food/Beverage Service	1	2%
Machine Operators	1	2%
Professional/Other	1	2%
Machinists	2	4%
Professional/Technical	2	4%
General Laborer	2	4%
Sales/Retail	3	6%
Administrative/Clerical	3	6%
Sales/Service	3	6%
Electrical/Electronics	5	10%
Mechanics	6	13%
Other	15	31%
Total	48	100%

Companies experiencing recruitment challenges:
27

Figure 29b: Responses to Current Recruitment Challenge Areas – “Other” responses	Count	Percent
Accountants	1	6%
Bakers	1	6%
Hairdressers	1	6%
Home care providers	1	6%
Lawyers	1	6%
Machine Operators	1	6%
Yard Technicians	1	6%

Mechanical engineers	1	6%
Pharmacists	1	6%
Managers	2	12%
Skilled Trades	3	18%
No Response	3	18%
Total	17	100%

Companies experiencing "Other" recruitment challenges:
15

Figure 30: Responses to Future recruitment challenges	Count	Percent
Administrative/Clerical	1	2%
Machine Operators	1	2%
Construction/Contractors	1	2%
Hospitality Service	1	2%
Food/Beverage Service	1	2%
Maintenance	1	2%
CDL Drivers	2	4%
Sales/Service	2	4%
General Laborer	2	4%
Professional/Other	2	4%
Material/Fabricators	2	4%
Machinists	3	5%
Professional/Technical	3	5%
Electrical/Electronics	4	7%
Sales/Retail	4	7%
Mechanics	7	13%
Other	19	34%
Total	56	100%

Companies reporting future recruitment challenges:
28

Figure 30b: Future recruitment challenges	Count	Percent
No Response	12	18%
No	19	29%
Yes	34	52%
Total	65	100%

Survey Respondents: 65

Figure 31: Is there anything we can do to help overcome issues with employee	Count	Percent

recruitment?		
Yes	16	25%
No	17	26%
No Response	32	49%
Total	65	100%

Survey Respondents: 65

Figure 31b: Is there anything we can do to help overcome issues with employee recruitment?: If Yes, please explain	Count	Percent
provide a better community for families	1	6%
encourage spouses to take on service jobs	1	6%
no response	14	88%
Total	16	100%

Companies reporting "Yes" to "Is there anything we can do to help overcome issues with employee recruitment": 16

Figure 32: Skill Level of Majority of Workforce (average % of workforce)	Percent
Skilled / Professional	63%
Semi-Skilled	27%
Entry-Level	9%

Survey Respondents: 65

Figure 32b: Entry-Level Employees as % of Workforce	Count	Percent
75 to 100%	1	2%
25 to 49%	3	5%
50 to 74%	5	8%
No Response	11	17%
less than 25%	45	69%
Total	65	100%

Survey Respondents: 65

Figure 32c: Semi-Skilled Employees as % of Workforce	Count	Percent
75 to 100%	3	5%
No Response	11	17%
50 to 74%	12	18%
25 to 49%	13	20%
less than 25%	26	40%
Total	65	100%

Survey Respondents: 65

Figure 32d: Skilled / Professional Employees as % of Workforce	Count	Percent
less than 25%	6	9%
25 to 49%	9	14%
No Response	11	17%
50 to 74%	15	23%
75 to 100%	24	37%
Total	65	100%

Survey Respondents: 65

Figure 33: Training Budget	Count	Percent
No Response	9	14%
No	22	34%
Yes	34	52%
Total	65	100%

Survey Respondents: 65

Figure 33b: Does the company offer in-house training?	Count	Percent
No	2	4%
No Response	13	28%
Yes	32	68%
Total	47	100%

Survey Respondents: 47

Figure 33c: Does the company use Contracted Training?	Count	Percent
No	9	19%
No Response	15	32%
Yes	23	49%
Total	47	100%

Survey Respondents: 47

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
No Response	12	26%
Yes	15	32%
No	20	43%
Total	47	100%

Survey Respondents: 47

Figure 35: Training or professional development needs	Count	Percent
Welding Apprenticeships	1	6%
Heavy Duty Mechanic Apprenticeships	1	6%
Heavy Equipment Training	1	6%
Sales	1	6%
Warehouse Training	1	6%
Business Management	5	31%
First Aid and WHMIS	6	38%
Total	16	100%

Survey Respondents: 47

Figure 35b: Are there areas of training or professional development that would be of benefit to you or your employees?	Count	Percent
No Response	11	23%
No	13	28%
Yes	23	49%
Total	47	100%

Survey Respondents: 47

Figure 36: What new training might you need to consider in the next five years?	Count	Percent
Communication skills	1	1%
Computer skills	1	1%

Electronics	1	1%
Civil engineering	1	1%
Robotics	2	3%
Water management	2	3%
Health and safety	4	6%
Skilled Trades	5	7%
Technology advances	7	10%
No Response	43	64%
Total	67	100%

Survey Respondents: 65

Figure 37: Preferred Modes of Training	Count	Percent
Other	3	4%
No Response	14	19%
Classroom	16	21%
Online/ Webinar training	20	27%
Individual coaching	22	29%
Total	75	100%

Survey Respondents: 47

Figure 38: Usual Training Locations	Count	Percent
United States	2	4%
British Columbia	3	5%
Rest of Canada	4	7%
Regional	9	16%
Local	15	26%
No Response	24	42%
Total	57	100%

Survey Respondents: 47

Union Status	Count	Percent
Yes	7	15%
Not applicable	18	38%
No	22	47%
Total	47	100%

Survey Respondents: 47

Figure 39: Critical considerations for employees	Count	Percent
No Response	8	7%
Transportation	10	8%

Other	15	13%
Child care	20	17%
Cost of living	32	27%
Housing	35	29%
Total	120	100%

Survey Respondents: 63

Figure 39b: Responses to "Other" for Critical Issues for Employees	Count	Percent
Training	1	7%
Buses for Children	1	7%
Child Care	1	7%
Cost of Living	1	7%
Tax Structure	1	7%
Outdoor activities	1	7%
Healthcare	2	14%
Flextime	2	14%
Local Amenities	2	14%
Affordable Housing	2	14%
Total	14	100%

Survey Respondents "Other": 15

Figure 39c: Location of Employees	Community	% Community
No Response	9	14
25-49%	4	6
0-24%	6	10
50-74%	15	24
75-100%	29	46
Total	63	100%

Survey Respondents: 63

Figure 39d: Location of Employees	Region	% Region
75-100%	5	8
25-49%	9	14
No Response	9	14
50-74%	11	17
0-24%	29	46
Total	63	100%

Survey Respondents: 63

Figure 39e: Location of Employees	Out of Region	% Out of Region
25-49%	1	2
75-100%	1	2
No Response	9	14
0-24%	52	83
Total	63	99%

Survey Respondents: 63

SALES

Figure 40: Annual Sales	Count	Percent
over \$5 million	12	18%
\$1million to \$4.99 million	14	22%
\$500,000 to \$999,999	2	3%
\$100,000 to \$499,999	5	8%
Under \$100,000	8	12%
Confidential/ no response	24	37%
Total	65	100%

Survey Respondents: 65

Figure 41: Status of Market	Count	Percent
No Response	3	5%
Decreasing	7	11%
Increasing	26	40%
Stable	29	45%
Total	65	100%

Survey Respondents: 65

Figure 42: Market Share in Comparison to Competitors	Count	Percent
No Response	11	23%
Decreasing	4	9%
Stable	15	32%
Increasing	17	36%
Total	47	100%

Survey Respondents: 47

Figure 43: Projected Sales Growth in Upcoming Year	Count	Percent
Confidential/ no response	12	26%
Declining	1	2%
100% or more	4	9%
50% - 99%	0	0%
25-49%	3	6%
10-24%	12	26%
1-9%	11	23%
0%	4	9%
Total	47	100%

Survey Respondents: 47

Figure 44: Historical Sales Trend (at this Location)	Count	Percent
Decreasing	5	8%
Staying the same	9	14%
Increasing	21	32%
No Response	30	46%
Total	65	100%

Survey Respondents: 65

Figure 45: Historical Sales Trend (at the Parent Company)	Count	Percent
Declining	1	2%
Staying the same	2	3%
Increasing	16	25%
Not Applicable/No response	46	71%
Total	65	100%

Survey Respondents: 65

Figure 46: Historical Sales Trend (within the Industry)	Count	Percent
Declining	4	6%
Staying the same	3	5%
Increasing	16	25%
Not Applicable/No response	42	65%
Total	65	100%

Survey Respondents: 65

Figure 47: Historical Export Sales Trend	Count	Percent
Declining	1	2%
Staying the same	1	2%
Increasing	2	4%
Not Applicable/No response	43	91%
Total	47	100%

Survey Respondents: 47

Figure 48: Sales Generated by Top 3 Customers	Count	Percent
No Response	18	29%
1 - 9%	12	19%
10 - 25%	6	10%
26 - 50%	4	6%
51 - 75%	4	6%
76 - 100%	19	30%
Total	63	100%

Survey Respondents: 63

Figure 49: Geographic Source of Majority of Sales	Percent
United States	2%
National	5%
Provincial	13%
International	2%
Local	62%

Survey Respondents: 47

Figure 49b: Source of Sales (International)	Count	Percent
50-99%	1	2%
under 50%	4	9%
0% or no answer	42	89%
Total	47	100%

Survey Respondents: 47

Figure 49c: Source of Sales (United States)	Count	Percent
50-99%	1	2%

under 50%	6	13%
0% or no answer	40	85%
Total	47	100%

Survey Respondents: 47

Figure 49d: Source of Sales (National)	Count	Percent
under 50%	13	28%
0% or no answer	34	72%
Total	47	100%

Survey Respondents: 47

Figure 49e: Source of Sales (Provincial)	Count	Percent
100%	1	2%
50-99%	7	15%
under 50%	10	21%
0% or no answer	29	62%
Total	47	100%

Survey Respondents: 47

Figure 49f: Source of Sales (Local/Regional)	Count	Percent
under 50%	7	15%
0% or no answer	10	21%
50-99%	12	26%
100%	18	38%
Total	47	100%

Survey Respondents: 47

Figure 50: International Trade Status	Count	Percent
Export	1	2%
Import	6	13%
None/ not applicable	40	85%
Total	47	100%

Survey Respondents: 47

Figure 51: Participation in Government Procurement	Count	Percent
Yes	6	10%
No	14	22%
No Response	43	68%

Total	63	100%
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Survey Respondents: 63

Figure 52: Source of Majority of Supplies	Percent
International	0%
United States	9%
Provincial	34%
National	23%
Local	17%

Survey Respondents: 47

Figure 52b: Source of Supplies (International)	Count	Percent
under 50%	1	2%
0% or no answer	46	98%
Total	47	100%

Survey Respondents: 47

Figure 52c: Source of Supplies (United States)	Count	Percent
50-99%	5	11%
under 50%	6	13%
0% or no answer	36	77%
Total	47	100%

Survey Respondents: 47

Figure 52d: Source of Supplies (National)	Count	Percent
100%	2	4%
50-99%	9	19%
0% or no answer	17	36%
under 50%	19	40%
Total	47	100%

Survey Respondents: 47

Figure 52e: Source of Supplies (Provincial)	Count	Percent
100%	2	4%
under 50%	6	13%
50-99%	17	36%
0% or no answer	22	47%
Total	47	100%

Survey Respondents: 47

Figure 52f: Source of Supplies (Local/Regional)	Count	Percent
50-99%	6	13%
under 50%	13	28%
0% or no answer	28	60%
Total	47	100%

Survey Respondents: 47

Figure 53: Reason for Out of Area Purchasing	Count	Percent
No control, head office decision	2	4%
No applicable to this business	3	6%
Higher costs locally	3	6%
Product not available here	21	44%
Other	3	6%
No Response	16	33%
Total	48	100%

Survey Respondents: 44

FACILITIES AND EQUIPMENT

Figure 54: Facility Size	Count	Percent
20,000 sq ft or more	3	5%
10,000-19,999 sq ft	3	5%
5,000-9,999 sq ft	8	12%
1,000 to 4,999 sq ft	22	34%
Less than 1,000 sq ft	15	23%
No Response	14	22%
Total	65	100%

Survey Respondents: 65

Figure 55: Condition of Facility	Count	Percent
No Response	9	19%
Poor	3	6%
Fair	9	19%
Good	16	34%
Excellent	10	21%
Total	47	100%

Survey Respondents: 47

Figure 56: Condition of Equipment	Count	Percent
No Response	14	30%
Poor	2	4%
Fair	5	11%
Good	14	30%
Excellent	12	26%
Total	47	100%

Survey Respondents: 47

Figure 57: Ownership Status	Count	Percent
No Response	9	14%
Leased	25	38%
Owned	31	48%
Total	65	100%

Survey Respondents: 65

Figure 58: Length of Time Remaining on Lease	Count	Percent
More than 5 yrs	1	4%
3-5 yrs	4	16%
1-2 Years	1	4%
Less than 1 yr	6	24%
No Response	13	52%
Total	25	100%

businesses that lease: 25.0

Figure 58b: Planning to renew current lease	Count	Percent
No	4	16%
No Response	5	20%
Yes	16	64%
Total	25	100%

Businesses that lease: 25.0

Figure 59: Historical investment trends: Over past 18 months in the facility	Count	Percent
Declining	1	2%
Staying the same	4	9%

Increasing	10	21%
No Response	32	68%
Total	47	100%

Survey Respondents: 47

Figure 60: Is there room for expansion at this site?	Count	Percent
Maybe	3	5%
Yes	16	25%
No	16	25%
No Response	30	46%
Total	65	100%

Survey Respondents: 65

Figure 61: Expansion Plans (Does the company plan to expand in the next three years?)	Count	Percent
No Response	17	26%
No	20	31%
Yes	28	43%
Total	65	100%

Survey Respondents: 65

Figure 62: Adequacy of Current Site for Expansion	Count	Percent
No Response	3	11%
Inadequate	12	43%
Adequate	13	46%
Total	28	100%

Respondents planning to expand: 28

Figure 63: Does the company plan to expand in the next three years?: Will it be in this community?	Count	Percent
No	3	11%
Yes	13	46%
No Response	12	43%
Total	28	100%

Survey Respondents answering Yes to "Does the company plan to expand in the next three years?" : 28

Figure 64: Estimated Total Investment in Expansion	Count	Percent
\$0 - \$99,000	0	0%
\$100,000-\$499,999	1	4%
\$500,000 - \$999,999	0	0%
\$1-\$4.9 million	2	7%
\$5 - 19.9 million	0	0%
\$20 million and over	1	4%
No Response	24	86%
Total	28	100%

Respondents planning to expand: 28

Figure 65: Expansion Budget for Equipment & Technology	Count	Percent
100%	1	4%
40 - 99%	0	0%
30 to 39%	2	7%
0 - 29%	0	0%
No Response	25	89%
Total	28	100%

Respondents planning to expand: 28

Figure 66: Expansion Budget for Real Estate	Count	Percent
100%	1	4%
80 - 99%	0	0%
70 to 79%	1	4%
20 - 69%	0	0%
10 - 19%	1	4%
0-10%	0	0%
No Response	25	89%
Total	28	100%

Respondents planning to expand: 28

Figure 67: Size of Facility Expansion	Count	Percent
20,000 sq ft or more	1	4%
5,000-9,999 sq ft	2	7%
No Response	25	89%
Total	28	100%

Respondents planning to expand: 28

Figure 68: Have there been any recent facility upgrades?	Count	Percent
No Response	17	36%
No	8	17%
Yes	22	47%
Total	47	100%

Survey Respondents: 47

Figure 68b: Have there been any recent facility upgrades? If Yes, when?: Month scale	Count	Percent
3	2	4%
6	2	4%
36	4	9%
24	4	9%
12	7	15%
No Response	28	60%
Total	47	100%

Survey Respondents: 47

Figure 69: Planning any upgrades to the facility?	Count	Percent
No Response	17	36%
No	18	38%
Yes	12	26%
Total	47	100%

Survey Respondents: 47

Figure 69b: Planning any upgrades to the facility? If Yes, when?: Month scale	Count	Percent
3	1	8%
24	1	8%
12	1	8%
6	2	17%
18	2	17%
No Response	5	42%
Total	12	100%

Survey Respondents answering Yes:12

Figure 69c: If No, are there any barriers to upgrading you wish to identify?	Count	Percent
Waiting on new facility	1	6%
No Response	17	94%
Total	18	100%

Survey Respondents answering no : 18

Figure 70: Barriers to Expansion	Count	Percent
Identifying and accessing new markets	2	5%
Problems with Development Approvals	2	5%
Local regulations (zoning)	3	7%
Finance	3	7%
Lack of skilled staff	5	12%
No Response	7	17%
Lack of suitable premises	8	19%
Other	12	29%
Total	42	100%

Respondents planning to expand: 28

Figure 70b: What, if any, are the major constraints on your expansion? Other (please specify)	Count	Percent
Finding an appropriate business partner	1	8%
Labour supply	1	8%
Provincial regulations, renovations	1	8%
Overhead costs of expanding	1	8%
Water & Sewer	2	17%
Lack of suitable premises	3	25%
Confidence in the economy	3	25%

Total	12	100%
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Survey Respondents "Other": 12

Figure 71: Expansion Assistance from Support Organization	Count	Percent
BC Ministry responsible for Economic Development	1	4%
BC Hydro	1	4%
Local Council	2	7%
Chamber of Commerce	2	7%
Other	3	11%
Local Economic Development Office	4	14%
No Response	15	54%
Total	28	100%

Respondents planning to expand: 20

Figure 71b: Sought Expansion Assistance	Count	Percent
Yes	5	25%
No	7	35%
No Response	8	40%
Total	20	100%

Respondents planning to expand: 20

Figure 72: Energy Efficiency Considerations in Expansion Plans	Count	Percent
No	3	7%
Yes	13	30%
No Response	28	64%
Total	44	100%

Survey Respondents: 44

Figure 73: Awareness of BC Hydro Power Smart	Count	Percent
No	7	15%
Yes	25	53%
No Response	15	32%
Total	47	100%

Survey Respondents: 47

GOVERNMENT SERVICES

Figure 74: Rating of Government Services

Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent
Access to Port Facilities	50	77%	5	8%	3	5%	6	9%	1	2%
Access to US Border	12	18%	2	3%	5	8%	33	51%	13	20%
Access to airport facilities	10	15%	19	29%	20	31%	15	23%	1	2%
Access to highway/ roads	6	9%	0	0%	6	9%	32	49%	21	32%
Access to markets	10	15%	4	6%	7	11%	26	40%	18	28%
Access to suppliers	11	17%	7	11%	14	22%	29	45%	4	6%
Availability of appropriately zoned land	27	42%	17	26%	10	15%	11	17%	0	0%
Availability of buildings for lease or purchase	17	26%	31	48%	10	15%	7	11%	0	0%
Availability of rail transport	46	71%	5	8%	1	2%	11	17%	2	3%
Availability of road transport services	13	20%	4	6%	7	11%	24	37%	17	26%
Availability of warehousing	31	48%	9	14%	8	12%	12	18%	5	8%
Development approval process	33	51%	9	14%	3	5%	15	23%	5	8%
Disposal of waste material	17	26%	5	8%	14	22%	22	34%	7	11%
Inspections /licensing	20	31%	4	6%	9	14%	25	38%	7	11%
Recycling	9	14%	9	14%	11	17%	26	40%	10	15%
Telecommunications (internet, cell)	7	11%	7	11%	11	17%	36	55%	4	6%

Water and sewerage supply	17	26%	6	9%	7	11%	26	40%	9	14%
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Figure 74b: (Relates to Please rate the following: Access to airport facilities...) Do you have any suggestions on how to improve any of the services and infrastructure listed above?	Count	Percent
No Response	5	11%
No	16	34%
Yes	26	55%
Total	47	100%

Survey Respondents: 47

Figure 75: Key words and responses in respondents' suggestions for improvements to government services	Count	Percent
Airport Services	1	4%
Awareness of bylaws	1	4%
Services available for businesses	1	4%
Enforce Building Code	1	4%
Water and sewage services	1	4%
Improve internet services	2	8%
Curbside recycling	4	16%
Community driven development approval process	5	20%
Land for development	9	36%
Total	25	100%

Survey Respondents: 47

Figure 76: Which airport services do you use?	Count	Percent
No Response	13	19%
Kalispell	11	16%
Cranbrook	20	29%
Calgary	25	36%
Total	69	100%

Survey Respondents: 47

Figure 77: Which airport services do you use? What services would you like to see at the local airport? (where appropriate)	Count	Percent
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No Response	36	78%
Larger planes	1	2%
More commuter flights to Vancouver and Kelowna	1	2%
Car rental services	1	2%
Wider choice of airlines/destinations	7	15%
Total	46	100%

Survey Respondents: 47

BUSINESS CLIMATE

Figure 78: Please rate the local business climate	Count	Percent
Poor	7	11%
Fair	20	31%
Good	29	45%
Excellent	4	6%
No Response	5	8%
Total	65	100%

Survey Respondents: 65

Figure 79: Rating of Business Climate Factors

Business Climate Factors	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent
BIA	54	83%	3	5%	4	6%	3	5%	1	2%
Chamber of Commerce	20	31%	8	12%	13	20%	18	28%	6	9%
Colleges/Universities	14	22%	21	32%	15	23%	14	22%	1	2%
Community Futures	33	51%	8	12%	7	11%	13	20%	4	6%
Cultural/Recreational Amenities	8	12%	14	22%	11	17%	23	35%	9	14%
Economic Development	8	12%	12	18%	15	23%	26	40%	4	6%
Housing	8	12%	10	15%	27	42%	18	28%	2	3%
K-12 education	18	28%	9	14%	15	23%	19	29%	4	6%
Local Government	9	14%	6	9%	16	25%	21	32%	13	20%
Local Tax Structure	13	20%	5	8%	15	23%	25	38%	7	11%
Technical Training	10	15%	26	40%	16	25%	12	18%	1	2%
Tourism services	16	25%	11	17%	15	23%	15	23%	8	12%
Workforce Availability	10	15%	17	26%	22	34%	14	22%	2	3%
Workforce Quality	9	14%	9	14%	12	18%	24	37%	11	17%
Workforce Stability	8	12%	12	18%	12	18%	26	40%	7	11%

Figure 80: Business Climate Today vs. 5 Years Ago	Count	Percent
Worse today	7	11%
No opinion	13	20%
No change	22	34%
Better today	23	35%
Total	65	100%

Survey Respondents: 65

Figure 81: Business Climate 5 Years from Today	Count	Percent
Will be worse	2	3%
No opinion	9	14%
No change	13	20%
Will be better	41	63%
Total	65	100%

Survey Respondents: 65

Figure 82: Community's Strengths as a Place to do Business	Count	Percent
Utilities	1	2%
Low cost of living	1	2%
Stable jobs	1	2%
Diversified community	1	2%
Golf course	1	2%
Low property taxes	1	2%
Local customer base	2	4%
Business friendly	2	4%
Infrastructure	2	4%
Lack of competition	2	4%
Supportive municipality	3	6%
Loyalty	3	6%
Above average household income	8	16%
Proximity to mines	9	18%
Close to Alberta and USA	14	27%
Total	51	100%

Survey Respondents: 65

Figure 83: Community's Weaknesses as a Place to do Business	Count	Percent
High business tax	1	2%
No community space	1	2%
Competition from the mining industry	1	2%
Affordable housing	2	3%
Infrastructure	3	5%
Resistance to change	3	5%
Healthcare	4	6%
Available office space	4	6%
Competition from Alberta and USA	4	6%
Transient population	7	11%
Isolated location	8	13%
High costs	8	13%
Lack of support for small businesses	9	14%
Lack of diversification	9	14%
Total	64	100%

Survey Respondents: 65

Figure 84: Barriers to Growth in Community	Count	Percent
No Response	5	11%
No	8	17%
Yes	34	72%
Total	47	100%

Survey Respondents: 47

Figure 84b: Barriers to Growth in Community	Count	Percent
Business oriented facilities	1	3%
Lack of promotion	2	5%
Affordable retail locations	2	5%
Competition from Alberta and USA	2	5%
Infrastructure	2	5%
Availability of local supplies	3	8%

Transient population	3	8%
Shortages of services	4	10%
Small population	4	10%
Resistance to change	5	13%
Land constraints	5	13%
Lack of diversity	6	15%
Total	39	100%

Survey Respondents: 47

Figure 85: Level of Service from business support providers

Business Support Providers	No response	% No response	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent
Basin Business Advisors	44	70%	12	19%	2	3%	1	2%	3	5%	1	2%
Chamber of Commerce	20	32%	3	5%	5	8%	12	19%	17	27%	6	10%
College Industry Liaison Officer	56	89%	6	10%	0	0%	0	0%	1	2%	0	0%
Community Futures	35	56%	9	14%	3	5%	2	3%	11	17%	3	5%
Continuing Education and Workforce Training	39	62%	9	14%	2	3%	5	8%	7	11%	1	2%
Economic Development Organization / Commission	41	65%	9	14%	2	3%	3	5%	7	11%	1	2%
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)	45	71%	12	19%	2	3%	1	2%	2	3%	1	2%
Invest Kootenay	46	73%	13	21%	2	3%	1	2%	1	2%	0	0%
Kootenay Aboriginal Business Advocates Society	44	70%	13	21%	2	3%	1	2%	3	5%	0	0%

National Research Council Industrial Research Assistance	56	89%	6	10%	0	0%	0	0%	1	2%	0	0%
Scientific Research and Experimental Development Tax Incentive Program	55	87%	7	11%	0	0%	0	0%	1	2%	0	0%

Figure 86: Are there suppliers you think could locate in this region?	Count	Percent
No	11	23%
Yes	15	32%
No Response	21	45%
Total	47	100%

Survey Respondents: 47

Figure 86b: Are there suppliers you think could locate in this region?: If Yes, please list	Count	Percent
Forestry supply companies	1	2%
Retail stores	1	2%
Hotel chains	1	2%
Electrical suppliers	2	4%
Grocery stores	3	6%
Mining supply companies	6	13%
No Response	34	71%
Total	48	100%

Survey Respondents: 47

Figure 87: Do you supply your products or services to any company in the community or region?	Count	Percent
No	1	2%
Yes	31	66%
No Response	15	32%
Total	47	100%

Survey Respondents: 47

Figure 88: What sectors, business or industry do you think the community should try to attract?	Count	Percent
No	1	2%
No Response	18	28%

Yes	46	71%
Total	65	100%

Survey Respondents: 65

Figure 88b: What sectors, business or industry do you think the community should try to attract?: If Yes, please list	Count	Percent
Recycling	1	2%
Education	1	2%
Housing	3	6%
Hotels	3	6%
Retail Stores	7	13%
Restaurants	13	24%
Tourism	13	24%
Manufacturing	13	24%
Total	54	100%

Survey Respondents: 65

Figure 89: Importance of Business Competitiveness Factors						
Importance of Business Competitiveness Factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important
Access to exporting and international markets	19	43%	14	32%	11	25%
Accessing capital	11	25%	12	27%	21	48%
Add or change in business, products or services	8	18%	8	18%	28	64%
Affordable shipping/freight	12	27%	6	14%	26	59%
Availability of telecommunications infrastructure and services	5	11%	3	7%	36	82%
Energy costs	8	18%	12	27%	24	55%
Exchange rate for Canadian dollar	10	23%	11	25%	23	52%

Expansion of workforce employees	6	14%	11	25%	27	61%
Improvement business management	9	20%	5	11%	30	68%
Improvement of customer services	8	18%	1	2%	35	80%
Improving worker productivity	7	16%	7	16%	30	68%
New market development locally	7	16%	9	20%	28	64%
New market development outside of region	8	18%	16	36%	20	45%
New product research and development	9	20%	8	18%	27	61%
Reliable air transportation	13	30%	19	43%	12	27%
Strategic alliances (joining with other businesses to provide products/services)	9	20%	12	27%	23	52%
Water/sewer availability	8	18%	14	32%	22	50%
Water/sewer costs	9	20%	15	34%	20	45%
Workforce skill development	6	14%	4	9%	34	77%
Workplace health and safety	7	16%	8	18%	29	66%

Survey Respondents: 44

Figure 90: Performance on Key Productivity Drivers

Performance on Key Productivity Drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent
Innovation & the use of technology	17	39%	2	5%	5	11%	12	27%	8	18%
Investing in people and skills	18	41%	0	0%	4	9%	12	27%	10	23%
Leadership and management capacity	17	39%	1	2%	1	2%	15	34%	10	23%
Measuring impact of productivity efforts/ investments	19	43%	0	0%	6	14%	13	30%	6	14%
Networking and collaboration with other businesses	18	41%	1	2%	6	14%	12	27%	7	16%
Organizing work (structures & processes)	17	39%	0	0%	4	9%	17	39%	6	14%
Productive workplace culture	17	39%	0	0%	1	2%	16	36%	10	23%

Survey Respondents: 44

Figure 91: Economic Drivers with Greatest Potential for Growth	Count	Percent
Arts	2	1%
Technology-based businesses	2	1%
Education	2	1%
Finance	1	1%
Other niche service businesses (e.g. services to seniors)	2	1%
Government	1	1%
culture and creative businesses	2	1%
Health & wellness	3	2%
Green or environmental businesses	4	3%
Manufacturing	7	4%
Relocation of people from urban centres	11	7%
Forestry	19	12%
Construction	31	20%
Tourism	34	22%
Other	37	23%
Total	158	100%

Survey Respondents: 63

Figure 91b: 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
Restaurants	1	2%
Retail	1	2%
No Response	18	40%
Mining	25	56%
Total	45	100%

Survey Respondents: 44

Figure 92: Impacted by Proximity to Alberta	Count	Percent
No Response	11	25%
No	14	32%
Yes	19	43%
Total	44	100%

Survey Respondents: 44

Figure 92b: Impact of Proximity to Alberta Comments	Count	Percent
Transport regulations	1	5%
Access to Equipment	1	5%
Negative impact	2	10%
Lower cost supplies	2	10%
Access to skilled trades	2	10%
Positive impact	4	19%
Better shopping	4	19%
Competition	5	24%
Total	21	100%

Companies impacted by proximity to Alberta: 19

ASSESSMENT AND PLANS

Figure 93: Facility's Overall Health	Count	Percent
Not applicable	10	21%
Fair	1	2%
Good	21	45%
Excellent	15	32%
Total	47	100%

Survey Respondents: 47

Figure 94: Parent Company Health	Count	Percent
Not applicable	27	57%
Poor	1	2%
Fair	1	2%
Good	6	13%
Excellent	12	26%
Total	47	100%

Survey Respondents: 47

Figure 95: Local Management's Attitude Towards Community	Count	Percent
Not applicable	11	23%
Poor	1	2%
Good	11	23%
Excellent	24	51%
Total	47	100%

Survey Respondents: 47

Figure 96: Parent Company's Attitude Towards Community	Count	Percent
Not applicable	27	57%
Poor	2	4%
Good	8	17%
Excellent	10	21%
Total	47	100%

Survey Respondents: 47

Figure 97: Risk of Facility Closing	Count	Percent
High	1	2%
Moderate	8	15%
Low	44	83%
Total	53	100%

Survey Respondents: 65

Figure 98: Risk of Facility Downsizing	Count	Percent
High	1	2%
Moderate	5	11%
Low	40	87%
Total	46	100%

Survey Respondents: 65